



ALBERTA LEISURE TRAVEL
INTENTIONS STUDY
(May 1-October 31, 2004)

Full Report

Presented to:
Alberta Economic Development

June 2004

Table of Contents

Background and Objectives 4

 Background..... 4

 Research Objectives 4

 Research Methodology 5

 Weighting Sample to Target Population..... 5

Executive Summary 6

 Key Findings 6

 Alberta Overview - Travel Intentions 6

 Alberta Overview - Trip Resources 7

 Alberta Overview - Centennial Awareness..... 7

Alberta Overview 8

 Travel Intentions..... 8

 Trip Intentions..... 8

 Trip Destinations Within Alberta..... 11

 Destinations Within Alberta 13

 Destinations Outside Alberta 14

 Trip Intentions..... 15

 Trip Duration 16

 Trip Participants..... 17

 Trip Resources 18

 Advance Planning 18

 Information Sources..... 19

 Centennial Awareness..... 20

 Demographics..... 21

Profile of Visitors 22

 Alberta North..... 22

 Visitor Origin 22

 Destination Profiling..... 23

 Traveller Profile 25

 Edmonton and Area..... 28

 Visitor Origin 28

 Destination Profiling..... 29

 Traveller Profile 31

 Alberta Central 34

 Visitor Origin 34

 Destination Profiling..... 34

 Traveller Profile 36

 Traveller Profile 37

 Canadian Rockies 40

 Visitor Origin 40

 Destination Profiling..... 41

 Traveller Profile 43

 Calgary and Area..... 46

 Visitor Origin 46

Destination Profiling.....	47
Traveller Profile	49
Alberta South.....	52
Visitor Origin	52
Destination Profiling.....	53
Traveller Profile	55

Background and Objectives

Background

- Leisure trips by Alberta residents account for approximately 75% of all trips made in Alberta and half of the revenue generated. Recent trends and world events suggest that Albertans' travel within the province will only increase in the foreseeable future. These provincial and regional markets will remain key sources of tourism visitors and revenues.
- Alberta Economic Development (AED) and Travel Alberta (TA) have commissioned this research study to understand the immediate leisure travel intentions of Albertans in the next 6 months (May 1 – October 31, 2004), and study these trends over a period of at least the next 3 years. This research will primarily focus on travel in Alberta, and will be used to assist marketing efforts.

Research Objectives

- The main goal of the research is to provide insight into the leisure travel intentions of Albertans, such as when and where the trips are to be taken, and how these decisions are made. This information will be used to assist Alberta's tourism businesses and Destination Marketing Organizations (DMO's) by providing usable information for marketing initiatives.
- To provide AED and TA with the appropriate information required to address these goals, this research project addresses the following specific objectives:
 1. Track information on a recurring basis twice a year regarding intentions of Alberta resident adults to travel within the next 6 months for leisure purposes within Alberta.
 2. Provide tourism businesses and DMO's with information needed for a more strategic and targeted approach to cross-promotion and product development.
 3. Track awareness of various promotional campaigns throughout Alberta based on the benchmark established in the spring and fall surveys of 2003.
 4. Gather information to help profile the origin of visitors to major hubs/destinations in the province (Calgary, Edmonton, Mountain Parks).
 5. Determine how "issues of the day" may impact intentions of Albertans to travel within the next 6-month period.

Research Methodology

- The target population is:
 - Residents of Alberta, who are a decision-maker in their household, are 18 years or older, have taken at least 1 leisure trip (at least 80 km away from home) in the past 12 months, and are intending to make at least 1 leisure trip between May 1 and October 31, 2004.
- 1402 respondents completed a 7-minute telephone survey between April 7 and 15, 2004.
- Random Digit Dialing sample was obtained to get a statistically accurate sample of Alberta households, including unlisted telephone numbers.
- Results were weighted to the age and gender characteristics of Albertans over the age of 18.
- Significant differences are reported at the 95% confidence level.

Weighting Sample to Target Population

- Since sampling of the target population was constrained by quota targets for the Tourism Destination Regions, the results were weighted to reflect the total population of the Census Divisions within each region based on the 2001 Statistics Canada census. The data was also weighted so that the distribution of age and gender are reflective of Alberta as a whole.
 - Please note that the non-qualifiers in the study had ages that were consistent with the respondents that qualified, so it was determined that weighting to the overall age and gender based on the 2001 Statistics Canada census was appropriate.

	Number of Completes	Sample Proportion	Population Proportion
Age / Gender			
Males 18-24	27	1.9%	7.0%
Males 25-44	257	18.3%	21.4%
Males 45-54	168	12.0%	9.6%
Males 55-64	73	5.2%	5.4%
Males 65+	49	3.5%	6.1%
Females 18-24	62	4.4%	6.7%
Females 25-44	390	27.8%	21.3%
Females 45-54	203	14.5%	9.3%
Females 55-64	100	7.1%	5.4%
Females 65+	73	5.2%	7.7%
Tourism Destination Region			
Alberta South	203	14.5%	10.3%
Calgary	350	25.0%	34.1%
Alberta Central	200	14.3%	16.9%
Edmonton	350	25.0%	31.2%
Alberta North	198	14.1%	6.3%
Canadian Rockies	101	7.2%	1.1%
Total	1402	100%	100%

Executive Summary

Key Findings

Alberta Overview - Travel Intentions

- Albertan Travellers (those planning to take at least 1 trip between May 1 and October 31, 2004) are planning to take an average of 7.4 leisure trips during the next 6 months. This is up significantly from 5.4 trips planned between June and November 2003.
 - Almost half of all trips planned by Albertan travellers will be taken during July and August.
 - The most prolific travellers during the next 6 months will be those living in Alberta Central and the Canadian Rockies, who are planning an average of 9.8 and 9.4 trips, respectively.
- Alberta will receive the largest proportion of Albertans' leisure travel, with 77% of trips planned to Alberta destinations.
 - Albertan travellers are planning to take significantly more trips in Alberta than a year ago, with an average of 5.7 trips planned in Alberta (vs. 3.8 in June - Nov 2003).
 - Travellers in Central Alberta are planning significantly more Alberta trips than other Alberta regions, at 8.2, on average.
- The top Alberta destination is the Canadian Rockies, with 35% of Albertan travellers planning to travel to the Canadian Rockies over the next 6 months. The least popular destination is Alberta North, with only 14% of Albertans planning a trip to Alberta North during the same time period.
- An average of 1.7 trips are planned by Albertan travellers to destinations outside the province, compared to 1.6 in 2003.
 - BC is the top destination, with 40% of all Albertan travellers planning at least 1 trip to BC during the next 6 months.
 - Albertans living in the Canadian Rockies are planning the largest number of average trips outside Alberta, at 2.8.
- The average duration of trips taken in Alberta over the next 6 months will be slightly shorter this year compared to last, with half of all trips lasting a weekend, and only 20% lasting 3 nights or longer.

Alberta Overview - Trip Resources

- While 1/4 of Albertan travellers take trips with only last minute planning or no planning at all, the vast majority of trips are planned between 2 weeks and 3 months in advance.
- The top information resources used to plan leisure trips include: the Internet (40%), Word-of-mouth (34%), Previous experience (21%), and the AMA, including AMA website (20%).

Alberta Overview - Centennial Awareness

- 2/3 of Albertan travellers are aware of the Alberta Centennial next year.
 - Awareness of the Centennial was highest in Edmonton and Area, at 74%.

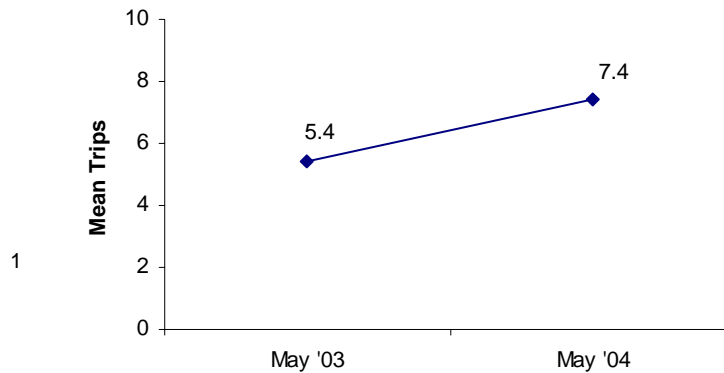
Alberta Overview

Travel Intentions

Trip Intentions

- Albertan travellers are planning to take 7.4 trips, on average, over the next 6 months (May 1 – October 31, 2004). This average includes only households that are planning at least 1 trip during May – October.
- The total trips planned are significantly higher than June – November of 2003.

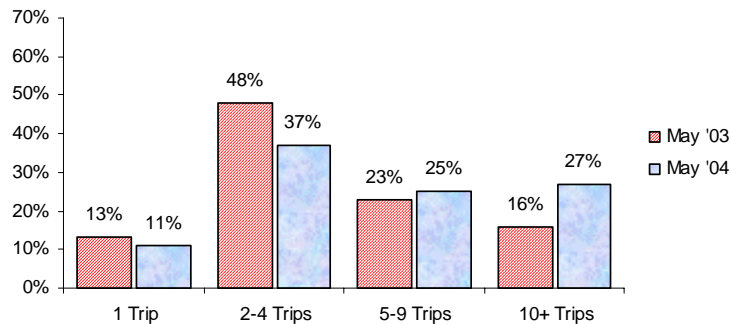
Average Trips Planned (next 6 mo.)



- Approximately 1/2 of Albertan travellers are planning to take 5 or more trips in the next 6 months.
- Contributing to the increase in total trips compared to last year is the significant increase in Albertan travellers who are planning 10 or more trips.

1

Number of Trips Planned



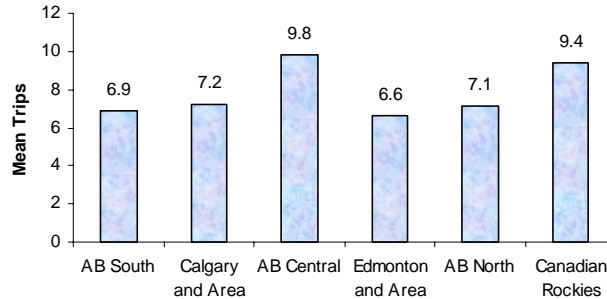
¹ Source: Q1: Total Trips Planned
Base: Albertan Travellers (UNW = 1402)

Trip Intentions (continued)

- Albertan travellers living in Alberta Central and the Canadian Rockies are planning to take significantly more trips during the next 6 months than travellers living in other regions of Alberta.

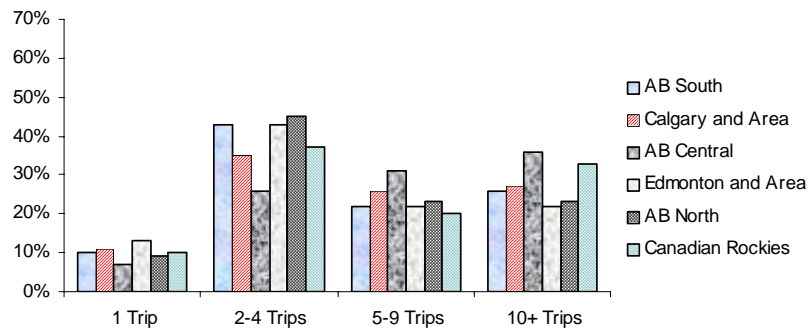
2

Average Trips Planned (next 6 mo.)



- The higher average number of trips for Central Alberta and the Canadian Rockies is largely related to a high proportion of travellers from these regions that are planning 10 or more trips.

Number of Trips Planned



2

Note: The regional breakdowns in the “Alberta Overview” section include the regions of *residence* (not destination).

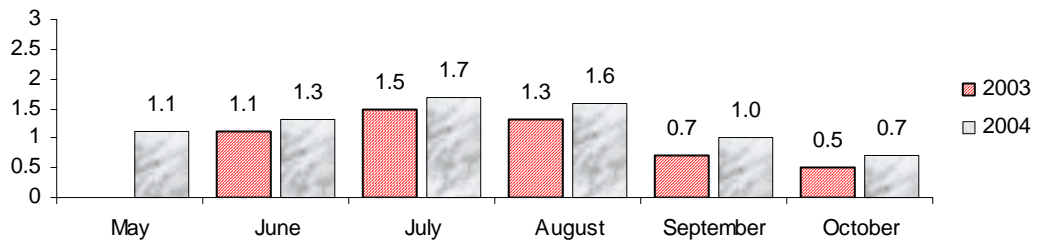
² Source: Q1: Total Trips Planned

Base: Albertan Travellers (UNW AB South=203, Calgary=350, AB Central=200, Edmonton=350, AB North=198, Rockies=101)

Trip Intentions (continued)

- When viewing the average number of trips planned by month, it is not surprising to see that the largest number of trips will be taken during July and August. Significantly more trips are planned for July and August than in other months.
- Intentions for trips in May were not asked about in the 2003 survey.

Mean Trips Planned by Month



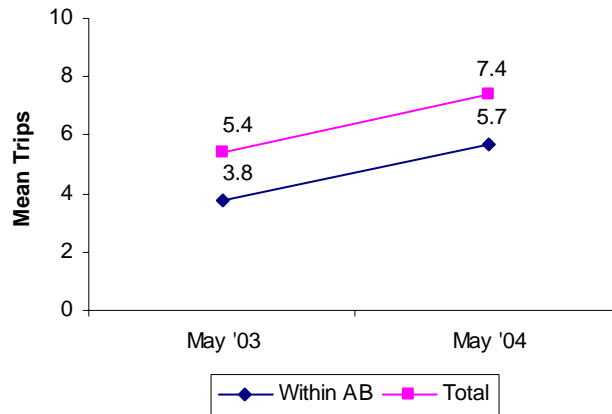
3

³ Source: Q2: Total Trips by Month
Base: Albertan Travellers (UNW = 1380)

Trip Destinations Within Alberta

- Of all trips intended over the next 6 months, nearly 6 trips will be taken on average, within Alberta.
- This is significantly higher than the number of Alberta trips planned during June – November 2003.

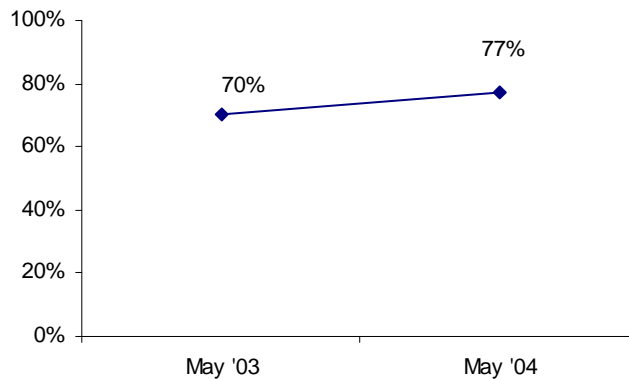
Average Number of Trips Within Alberta



4

- Nearly 80% of all trips planned during the next 6 months will be to Alberta destinations.
- This is slightly higher than the proportion of Alberta trips planned in June – November 2003.

Proportion of Trips Within Alberta

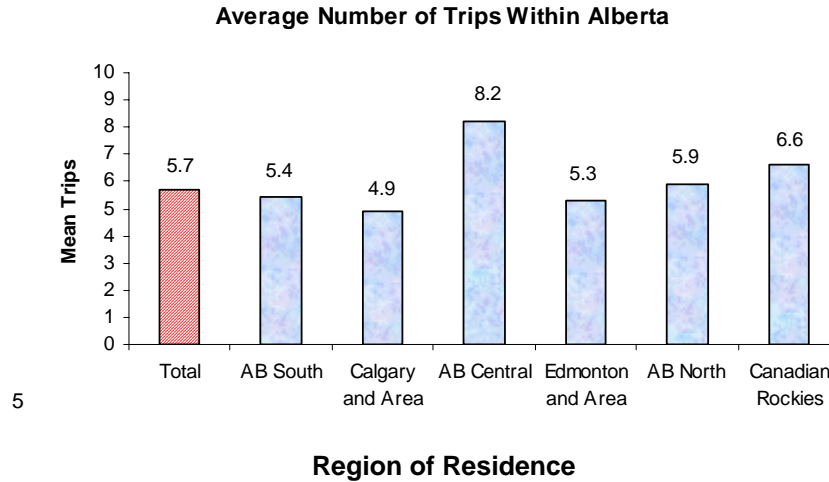


4

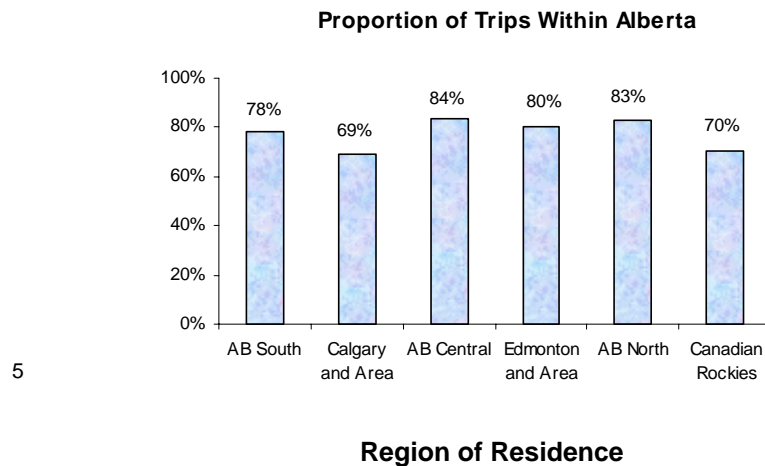
⁴ Source: Q3: Trips within / outside AB
Base: Albertan Travellers (UNW = 1402)

Trip Destinations Within Alberta (continued)

- Travellers in Alberta Central are taking significantly more trips in-province than travellers living in any other region.



- Although travellers living in the Canadian Rockies will take a higher number of trips over the next 6 months than most other regions, they are more likely to take these trips out of province.
- Travellers in Calgary and Area also plan to take a larger proportion of their trips outside Alberta.

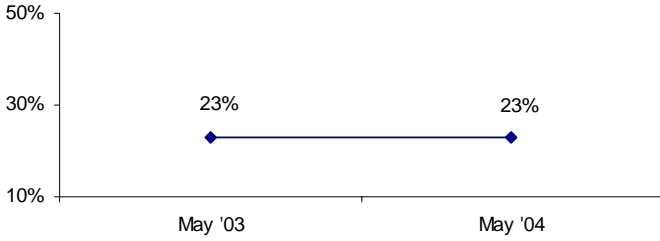


⁵ Source: Q3: Trips within/outside AB
 Base: Albertan Travellers (UNW South=203, Calgary=350, Central=200, Edmonton=350, North=198, Rockies=101)

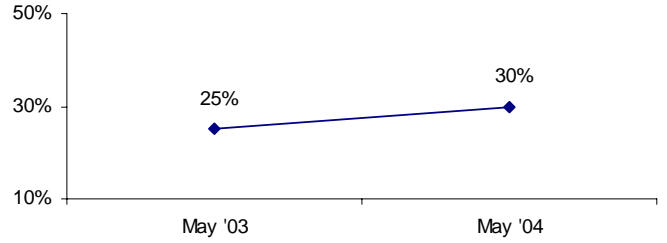
Destinations Within Alberta

- While over 1/3 of Albertan travellers are planning at least 1 trip to the Canadian Rockies during the next 6 months, only 14% are planning a trip to Alberta North*.

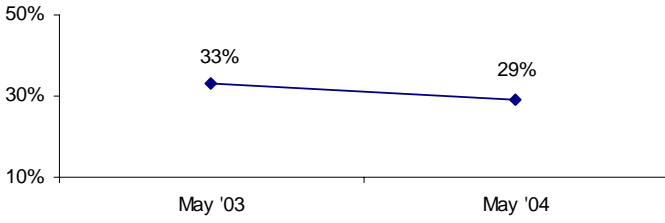
Proportion of Albertans Traveling to Alberta South



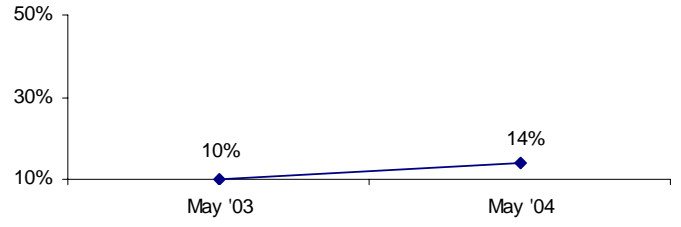
Proportion of Albertans Traveling to Edmonton and Area



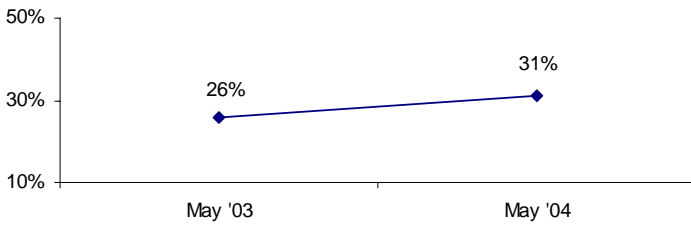
Proportion of Albertans Traveling to Calgary and Area



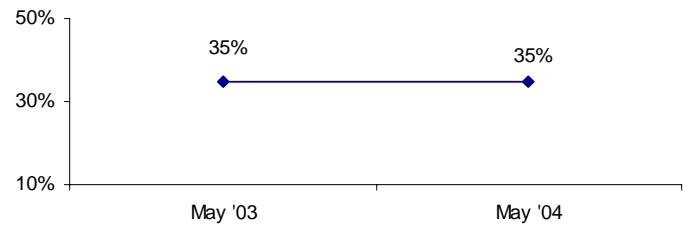
Proportion of Albertans Traveling to Alberta North



Proportion of Albertans Traveling to Alberta Central



Proportion of Albertans Traveling to the Rockies



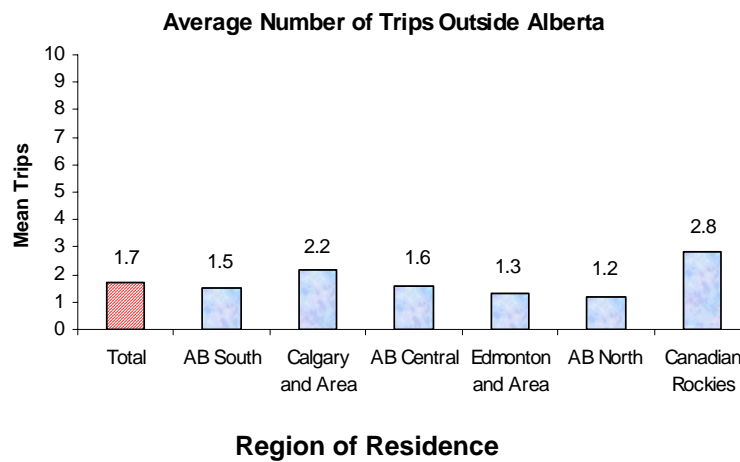
* In the 2004 survey, respondents could mention up to 4 key travel destinations, whereas in the 2003 survey there was a maximum of 3 mentions.

⁶ Source: Q6: Destinations planned within AB
Base: All Respondents (UNW = 1402)

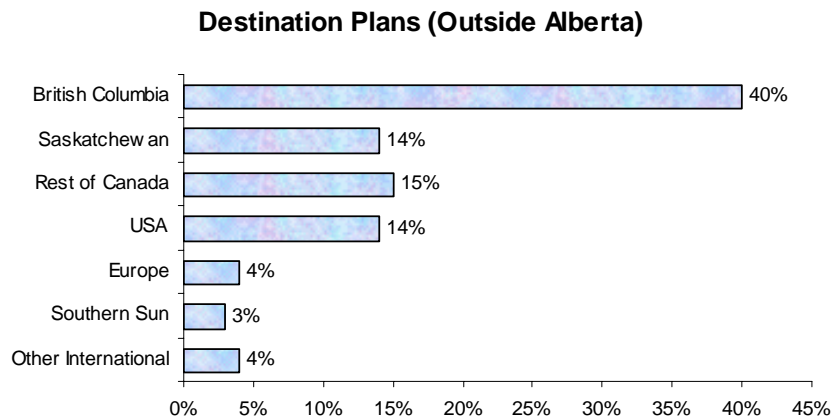
Destinations Outside Alberta

- Travellers from the Canadian Rockies and Calgary and Area are planning the largest number of trips outside Alberta. This is likely due to their close proximity to British Columbia, since half of the travellers in these regions plan to go to B.C. in the next 6 months.
- British Columbia attracts the largest number of Alberta travellers. 40% of Albertan travellers are planning to take a trip to B.C. during the next 6 months. Saskatchewan, the rest of Canada, and the U.S. are the next most popular destinations for Alberta travellers, followed by other, more distant destinations.

7



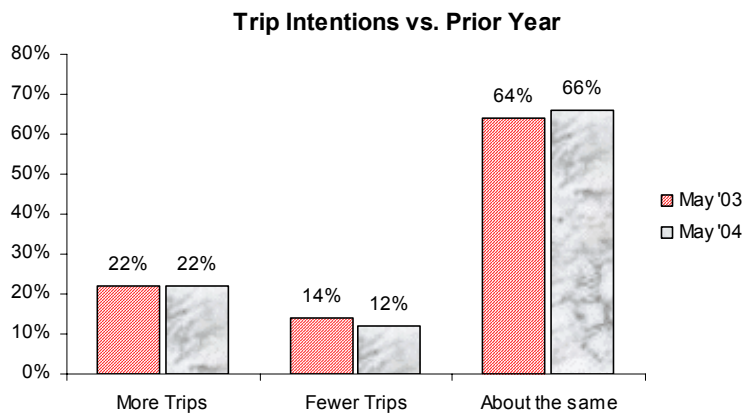
7



⁷ Source: Q3: Trips within/outside AB; Q3c: Dest. plans outside AB
 Base: Albertan Travellers (UNW South=203, Calgary=350, Central=200, Edmonton=350, North=198, Canadian Rockies=101)

Trip Intentions

- Albertan travellers were asked whether they are planning on taking more, fewer, or about the same number of trips compared to the previous year. In the May 2004 survey, respondents indicated that they are planning to travel more within Alberta this year than in the same period a year ago. Although this doesn't reflect the number of additional trips intended, it does hint that there will be greater travel volumes this year.
- In looking at the chart below, the breakdowns in 2004 are almost identical to 2003 for each of 'more', 'fewer', and 'about the same' number of trips.



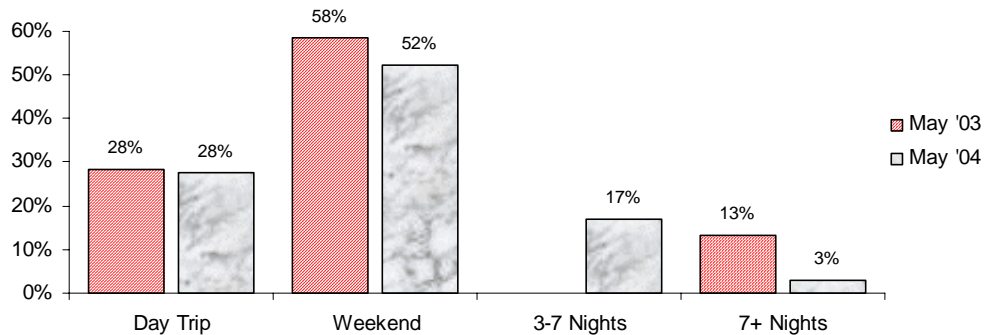
8

⁸ Source: Q4: Trip intentions compared to previous year
 Base: Albertans travelling in-province (UNW Total=1250)

Trip Duration

- Half of all trips taken by Albertan travellers within Alberta between May 1 and October 31 will be a weekend in duration.
- Only 1/5 of trips taken in Alberta in the next 6 months will be 3 nights or longer.
- The proportion of trips lasting a week or longer is significantly lower than in June – November 2003. Note that in 2003, the question listed only ‘one night stay’, ‘a weekend or long weekend’, and ‘1 week or longer’ as options.

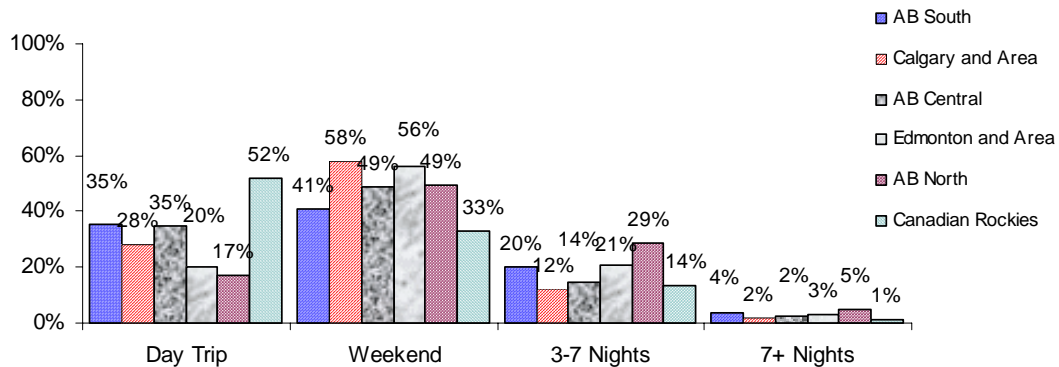
Proportion of Alberta Trips by Duration



9

- The higher number of average trips planned by travellers from the Canadian Rockies can be largely explained by the significantly higher number of day trips that will be taken by travellers from this region.
 - Interestingly, half of all trips taken by travellers from the Canadian Rockies over the next 6 months will be day trips, with the largest portion of the trips seemingly destined for Edmonton and Area and Calgary and Area.

Proportion of Alberta Trips by Duration (by Region of Residence)

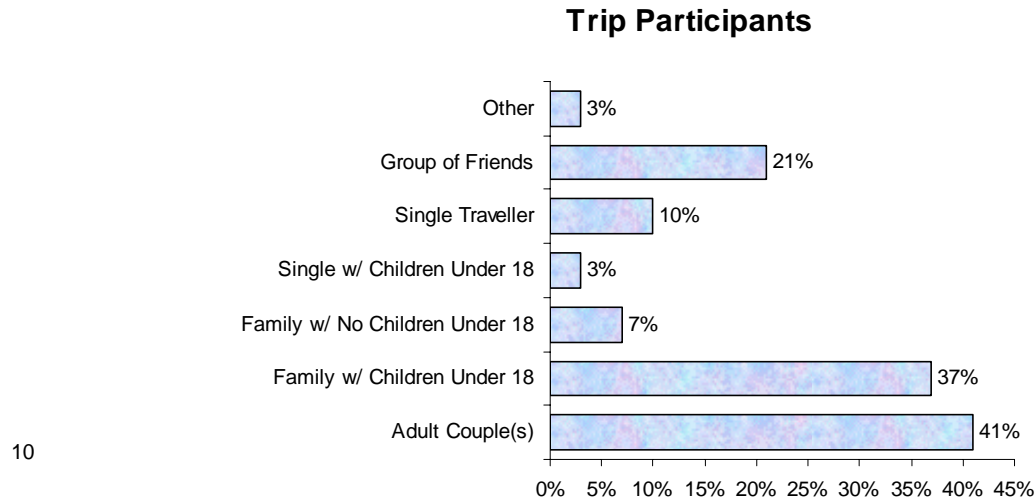


⁹ Source: Q5: Trip duration

Base: Albertans travelling in-province (UNW Total=1241, South=185, Calgary=298, Central=186, Edmonton=304, North=181, Rockies=87)

Trip Participants

- Most of the planned trips will include either families with children or adult couples.
 - Although, in aggregate, only 10% of Albertan travellers will take trips as a single traveller, 22% of travellers from the Canadian Rockies plan to take at least one trip as a single traveller.

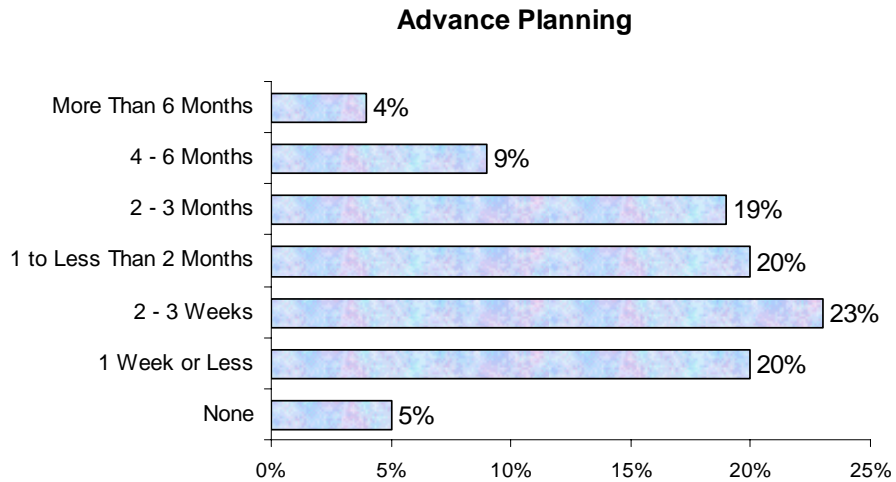


¹⁰ Source: Q10: Trip participants
Base: Albertan Travellers (UNW = 1401)

Trip Resources

Advance Planning

- While 1/4 of Albertan travellers take trips with only last minute planning or no planning at all, the vast majority of trips are planned between 2 weeks and 3 months in advance.
- Advance planning time is consistent among all of the regions surveyed.



11

¹¹ Source: Q7b: Advance planning
Base: Albertan Travellers (UNW = 1370)

Information Sources

- The most common sources of information for travel are the Internet, Word-of-mouth, Previous experience, and the AMA. Few differences are found in the information sources used by travellers from each region.

Main Sources of Information	Region of Residence						
	Total	AB South (G)	Calgary and Area (H)	AB Central (I)	Edmonton and Area (J)	AB North (K)	Canadian Rockies (L)
Internet in general	40%	27%	46% GK	38% G	42% GK	31%	36%
Friends/Family/Word-of-mouth	34%	38%	30%	45% HJL	32%	38%	27%
Previous experiences/visits	21%	22%	21%	16%	23%	18%	27%
Alberta Motor Assn (AMA)	17%	17% L	16% L	12%	21% IL	16% L	6%
AMA website	3%	2%	4%	1%	3%	1%	0%
Brochures and pamphlets	9%	8%	9%	6%	12% IL	6%	4%
Travel Alberta website	6%	4%	8% K	5%	6%	3%	6%
Tourist Information Centres	6%	10% H	4%	7%	5%	6%	7%
Newspapers	6%	5%	8% K	7%	4%	3%	3%
Magazines	5%	3%	6% L	5% L	6% L	4%	1%
Television	3%	2%	5% L	4%	0%	2%	1%
Campground guide	3%	2%	4% K	2%	4% K	0%	2%
Accommodation guide	2%	1%	1%	1%	3% IK	1%	0%
Tour Books	2%	3%	3%	3%	1%	2%	7%
Radio	1%	1%	0%	3%	0%	2%	1%
Event Calendar	1%	1%	0%	1%	1%	0%	3%
Travel Agencies	1%	1%	1%	1%	1%	1%	1%
Tourism Calgary website	0%	0%	0%	0%	0%	0%	1%
Tourism Edmonton website	0%	0%	1%	1%	0%	1%	1%
Billboards	0%	0%	0%	0%	0%	1%	0%
Bed and Breakfast listings	0%	0%	0%	0%	0%	0%	0%
1-800/Toll free tourism #s	0%	1%	0%	0%	1%	1%	4%
1-800 Hotel Reser. #s	0%	1%	1%	0%	0%	1%	2%
Other	10%	8%	9%	13%	11%	7%	10%
Not Applicable	5%	9% H	3%	6%	5%	6%	4%

12

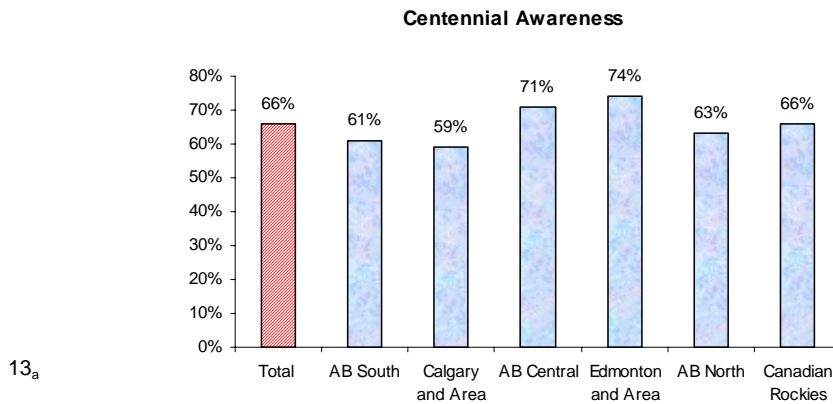
The letters beside the numbers indicate which segments are significantly different. For example, significantly more respondents in Edmonton and Area use the Internet than those in either Alberta South or Alberta North.

¹² Source: Q7: Info. sources for planning leisure trips
Base: Albertan Travellers (1402)

Centennial Awareness

- 2/3 of Albertan travellers are aware of the Alberta Centennial next year.
- Centennial awareness tends to be higher among travellers from Edmonton and Area. Travellers from Calgary and Area seem to have the lowest awareness.
- Overall awareness of the Centennial has increased compared to last September, when only 53% of Albertans surveyed indicated awareness. *

* From 2003 Tourism Awareness Survey conducted on behalf of Travel Alberta In-Province



13a Source: Q9: Centennial Awareness

Base: Albertan Travellers (UNW Total=1402 South=203, Calgary=350, Central=200, Edmonton=350, North=198, Rockies=101)

Demographics

	Total	AB South (G)	Calgary and Area (H)	AB Central (I)	Edmonton and Area (J)	AB North (K)	Canadian Rockies (L)
Age							
18 - 24	14%	14%	14%	14%	14%	14%	14%
25 - 44	43%	43%	43%	43%	43%	43%	43%
45 - 54	19%	19%	19%	19%	19%	19%	19%
55 - 64	11%	11%	11%	11%	11%	11%	11%
65 or older	14%	14%	14%	14%	14%	14%	14%
Mean Age	43.7	43.8	43.4	43.8	43.8	43.6	43.8
Income							
Less than \$25,000	9%	17% HIJ	9%	7%	8%	11%	13%
\$25,000 to less than \$50,000	25%	23%	20%	35% GHK	28%	20%	22%
\$50,000 to less than \$100,000	39%	47%	37%	38%	40%	38%	49%
\$100,000 and over	26%	13%	34% GIL	20%	25% G	31% GIL	16%
Mean Income (\$ thousands)	\$67.4	\$61.2	\$71.2 GI	\$63.2	\$67.0	\$69.6 GI	\$64.5
Family Composition							
Single adult household	17%	13%	18%	19%	17%	16%	27% G
2 adults with children	41%	41% L	41%	46% L	37%	42%	29%
2 adults without children	32%	32%	32%	30%	34%	33%	28%
Single parent with children living at home	4%	4% I	3%	1%	4%	4%	4%
Other (include if there are children or not)	6%	6%	5%	4%	8%	5%	11%
Trip Participants							
Adult couple(s)	41%	35%	41%	47% GL	39%	43%	33%
Family with children under 18	37%	41%	35%	45% HL	36%	37%	30%
Family with no children under 18	7%	7%	7%	8%	7%	9%	4%
Single adult with children under 18	3%	0%	2%	5%	4%	4%	3%
Single Traveller	10%	9%	12%	12%	9%	7%	22% GJK
Group of friends travelling together	21%	21% K	21% K	18%	24% K	12%	21%
Other	3%	1%	3%	2%	4% G	3%	0%

14

The letters beside the numbers indicate which segments are significantly different. For example, significantly more respondents in the Canadian Rockies make trips as single travellers than those in Alberta South, Edmonton and Area, or Alberta North.

¹⁴ Source: D2: Year of birth; D3: Income; D1: Family composition; Q10: Leisure trip composition
Base: Albertan Travellers (UNW Total=1402 South=203, Calgary=350, Central=200, Edmonton=350, North=198, Rockies=101)

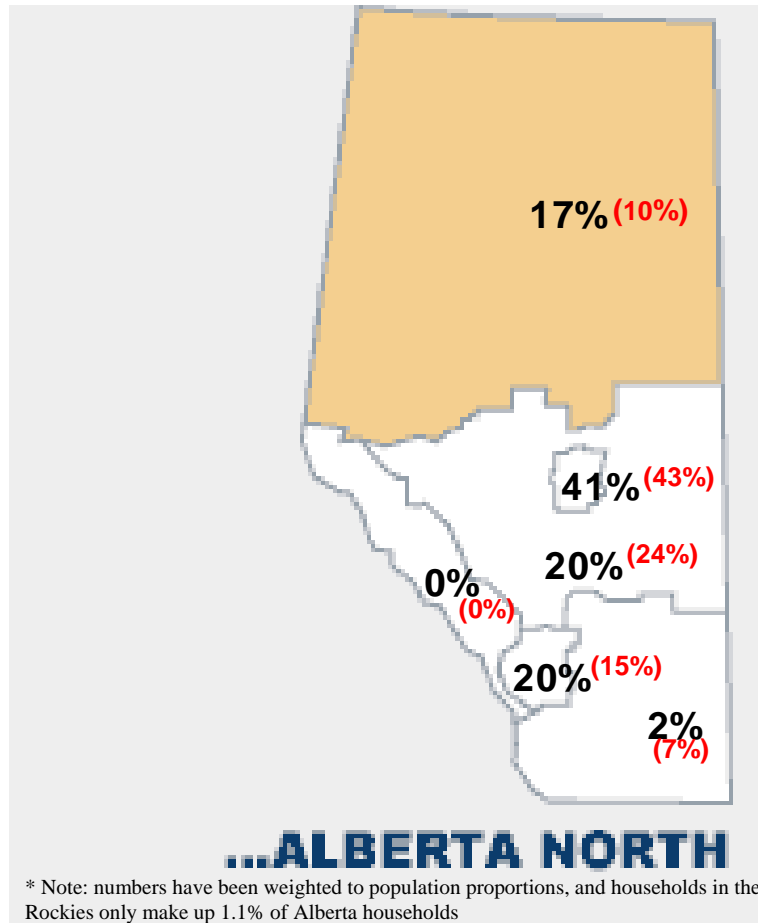
Profile of Visitors

Alberta North

Visitor Origin

- Travellers from Edmonton and Area will make up 41% of all Albertan leisure travellers to Alberta North over the next 6 months.
- With only 14% of Albertan travellers planning to travel to Alberta North, this region will receive the lowest proportion of Alberta visitors of all of the Tourism Destination Regions.
- On the map below, bold numbers indicate the proportion of visitors from each TDR to Alberta North from May – October, 2004. Numbers in brackets indicate the proportion of visitors from each TDR to Alberta North from June – November, 2003. Note that the Alberta North residents are travelling to destinations 80km or greater from their place of residence within the region.

Total Visitors to Alberta North by Place of Residence (i.e., 41% of Visitors to Alberta North are from Edmonton and Area)



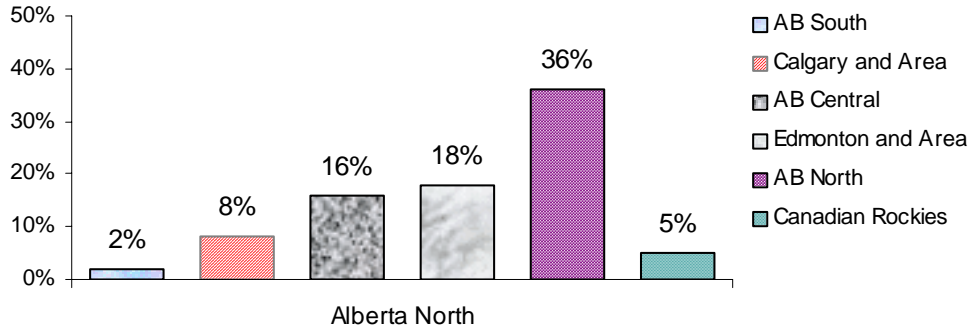
15

¹⁵ Source: TDR: Place of Residence; Q6: Destination in Alberta
Base: All respondents travelling to AB North (UNW = 200)

Destination Profiling

- 1/3 of Alberta North households plan to take at least 1 trip in Alberta North over the next 6 months.
- Less than 10% of travellers from each of the Canadian Rockies, Calgary and Area, and Alberta South plan to travel to Alberta North from May 1 – October 31.

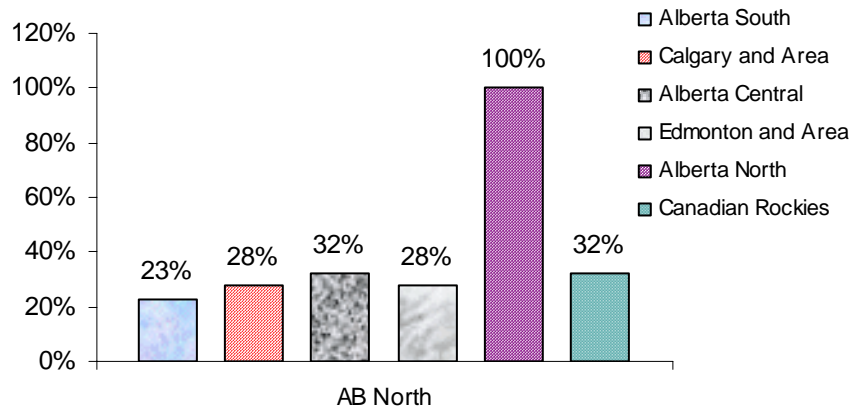
Percentage Travelling to AB North by Region of Origin



16

- Travellers to Alberta North are planning to go to the other 5 Alberta Regions in relatively similar numbers, and travel outside of Alberta in a consistent manner to Albertan travellers as a whole.

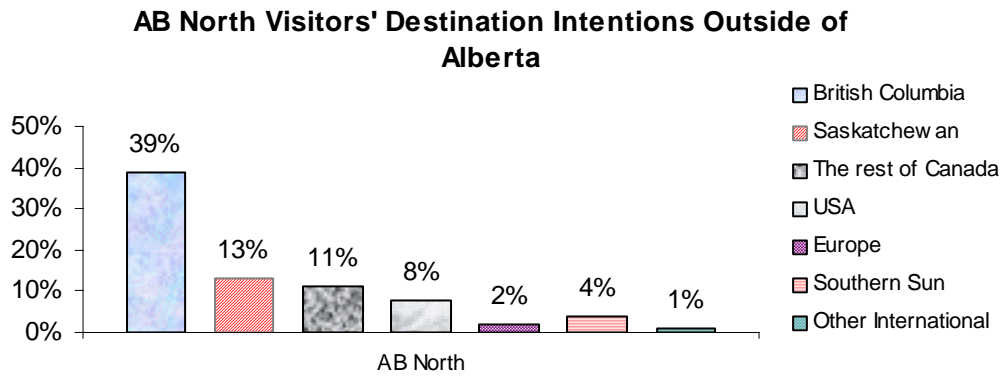
Other TDR's That Visitors to AB North Intend to Visit



16a

¹⁶ Source: Q6: Destination Plans
 Base: Albertan Travellers (UNW South=203, Calgary=350, Central=200, Edmonton=350, North=198, Rockies=101)
^{16a} Source: Q6: Destination Plans
 Base: All respondents travelling to AB North (UNW = 200)

Destination Profiling (continued)



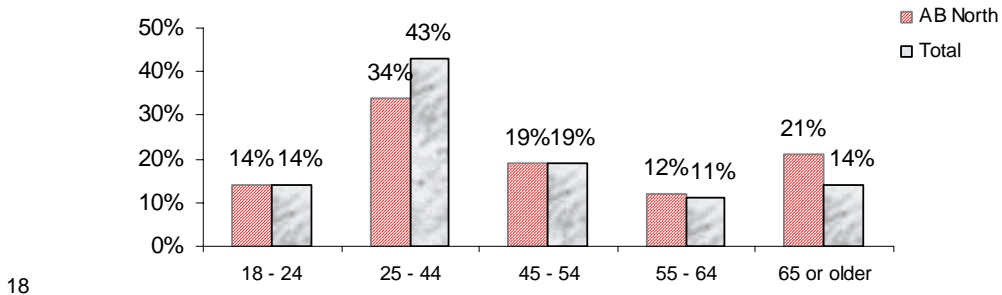
17

¹⁷ Source: Q3c: Destination Plans Outside of Alberta
Base: All respondents travelling to AB North (UNW = 200)

Traveller Profile

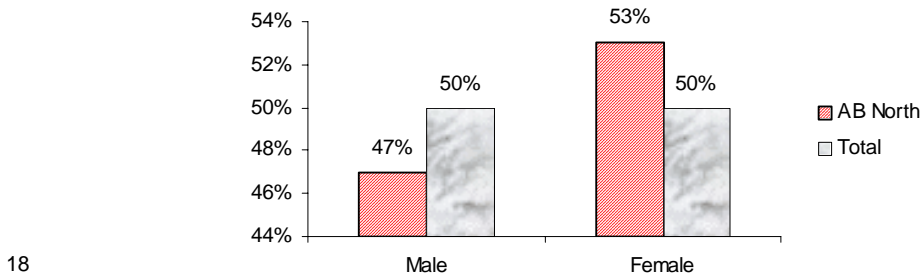
- The mean age of Alberta travellers coming to Alberta North is 46, with a higher than average concentration in the 65 and older age group, and a lower than average concentration in the 25 – 44 age bracket.

Comparison of Visitor Age to Aggregate



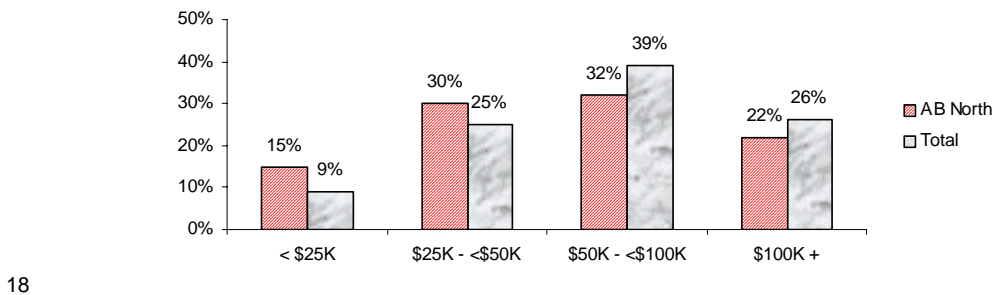
- A slightly higher percentage of visitors are female (53%) than male.

Comparison of Visitor Gender to Aggregate



- Mean household income for travellers visiting Alberta North is the lowest of all the travel destination regions at \$61,700.

Comparison of Visitor Income to Aggregate

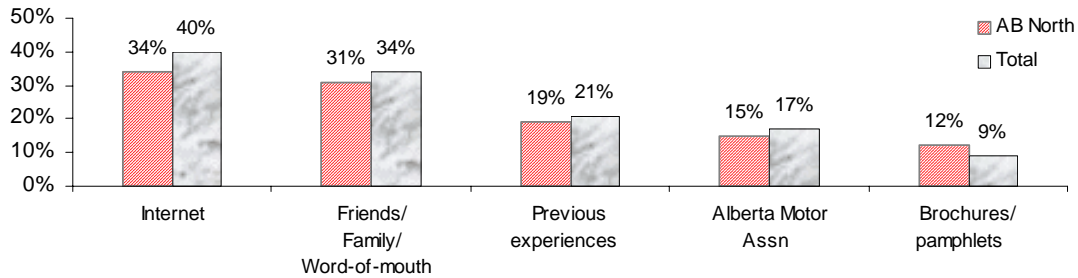


¹⁸ Source: S3: Age; S2: Gender; D3: Household Income
 Base: All respondents travelling to AB North (UNW = 200 [age, gender], 174 [income])

Traveller Profile (continued)

- Alberta North visitors use fewer sources of information when planning their trip. The only sources cited by at least 10% of visitors were: Internet in general, Word-of-mouth, Previous experiences, AMA, and Brochures and pamphlets.
- Alberta North is one of only 2 travel destinations in which visitors use Brochures and pamphlets as a major source (greater than 10%) of travel information.

Comparison of Visitor Information Sources to Aggregate



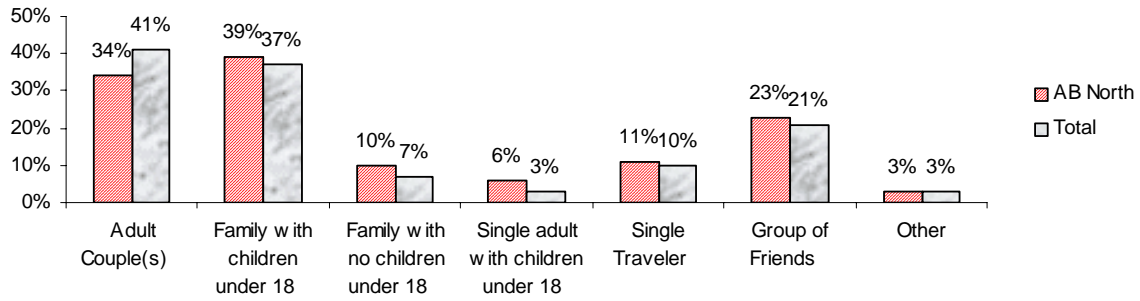
19

19 Source: Q7: Information Sources
 Base: All respondents travelling to AB North (UNW = 200)

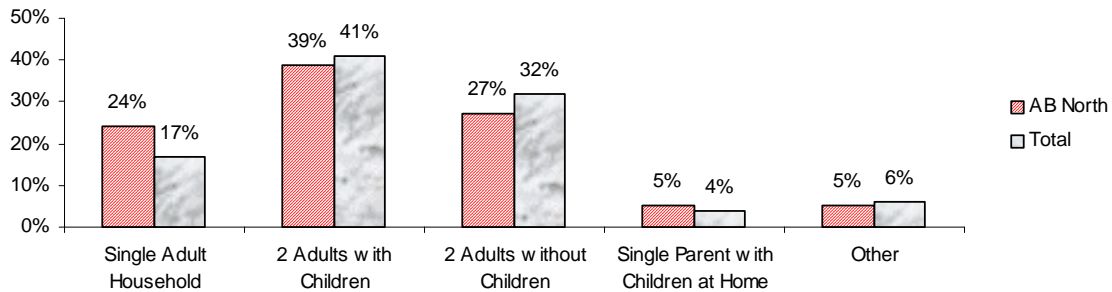
Traveller Profile (continued)

- 1/3 of Alberta travellers visiting Alberta North plan to travel as adult couples during the next 6 months, and 39% travel as families with children under 18. Just under a quarter of visitors travel as groups of friends travelling together.

Comparison of Trip Participants to Aggregate



Comparison of Visitor Family Composition to Aggregate



20

²⁰ Source: Q10: Composition of Participants; D1: Household Status
Base: All respondents travelling to AB North (UNW = 199)

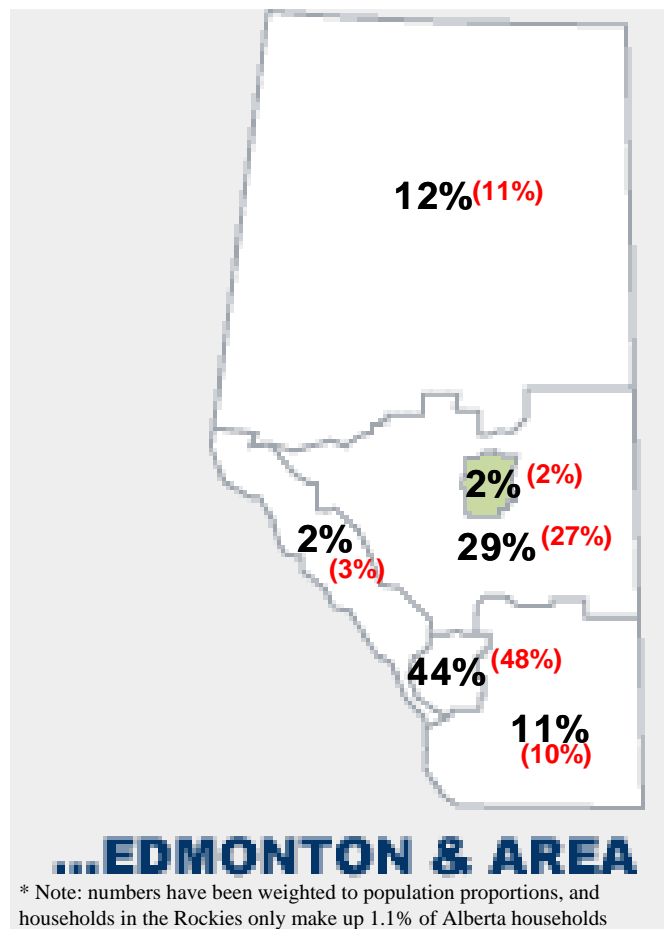
Edmonton and Area

Visitor Origin

- Travellers from Calgary and Area will make up the largest proportion of all Albertan leisure travellers to Edmonton and Area over the next 6 months, at 44%.
- 30% of all Albertan travellers plan to travel to Edmonton and Area at least once in the next 6 months.
- On the map below, bold numbers indicate the proportion of visitors from each TDR to Alberta North from May – October, 2004. Numbers in brackets indicate the proportion of visitors from each TDR to Edmonton and Area from June – November, 2003. Note that the Edmonton and Area residents are travelling to destinations 80km or greater from their place of residence within the region.

Total Visitors to Edmonton & Area by Place of Residence

(i.e., 44% of Visitors to Edmonton & Area are from Calgary and Area)



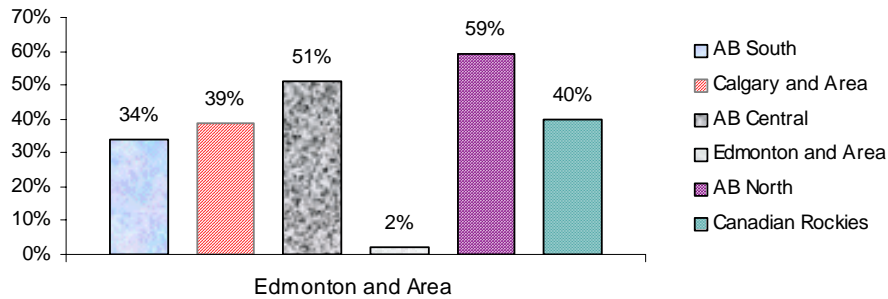
21

²¹ Source: TDR: Place of Residence; Q6: Destination in Alberta
Base: All respondents travelling to Edmonton and Area (UNW = 492)

Destination Profiling

- More than 50% of travellers from each of Alberta Central and Alberta North plan to travel to Edmonton and Area from May 1 – October 31.

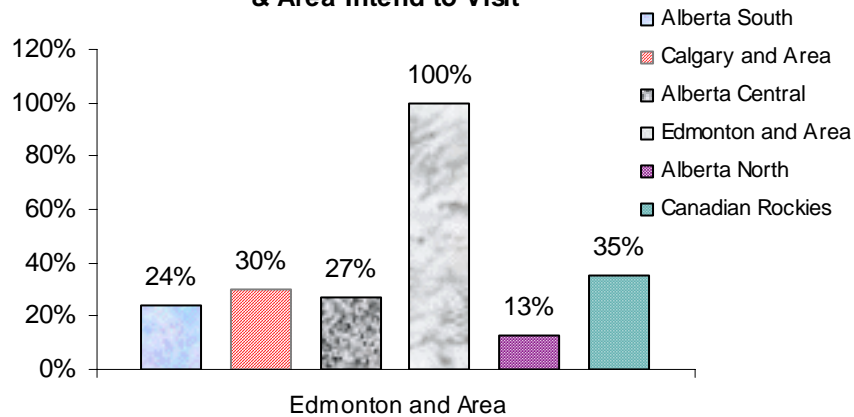
Percentage Travelling to Edmonton and Area by Region of Origin



22

- The largest proportion of travellers to Edmonton and Area are also going to the Canadian Rockies, with the fewest also going to Alberta North in the next 6 months.

Other TDR's That Visitors to Edmonton & Area Intend to Visit



22_a

²² Source: Q6: Destination Plans

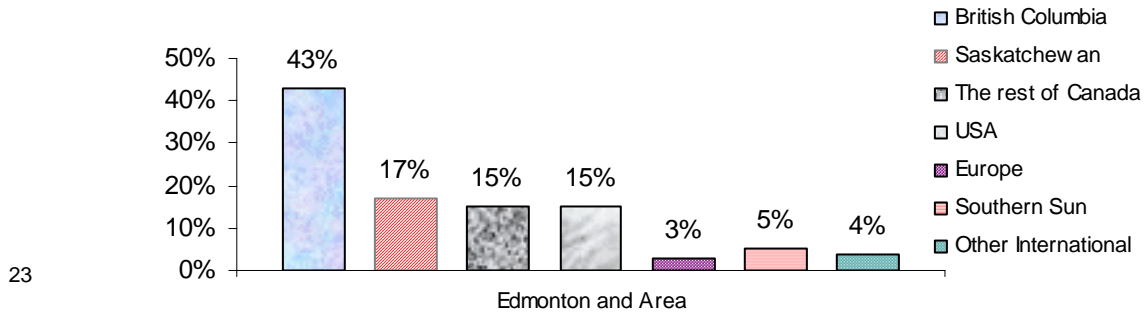
Base: Albertan Travellers (UNW South=203, Calgary=350, Central=200, Edmonton=350, North=198, Rockies=101)

22a Source: Q6: Destination Plans

Base: All respondents travelling to Edmonton and Area (UNW = 492)

Destination Profiling_(continued)

Edmonton and Area Visitors' Destination Intentions Outside of Alberta



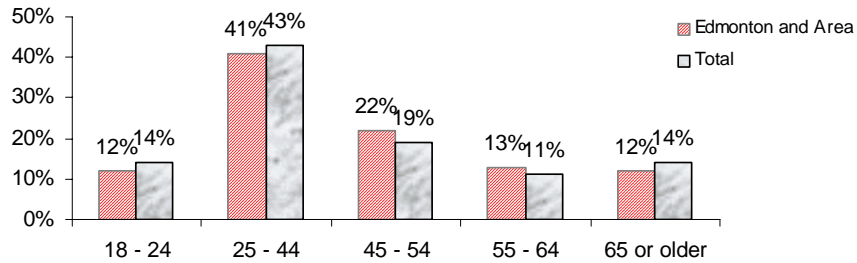
23

²³ Source: Q3c: Destination Plans Outside of Alberta
 Base: All respondents travelling to Edmonton and Area (UNW = 492)

Traveller Profile

- The mean age of Alberta travellers coming to Edmonton and Area is 44.

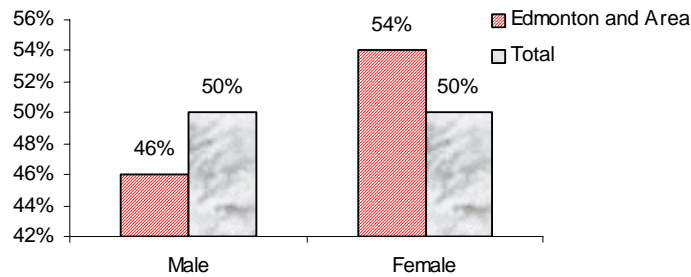
Comparison of Visitor Age to Aggregate



24

- A slightly higher percentage of visitors are female (54%) than male.

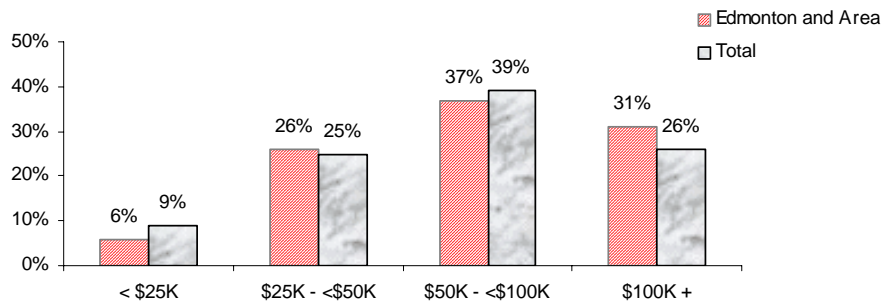
Comparison of Visitor Gender to Aggregate



24

- Mean household income for travellers visiting Edmonton and Area is \$69,700.

Comparison of Visitor Income to Aggregate



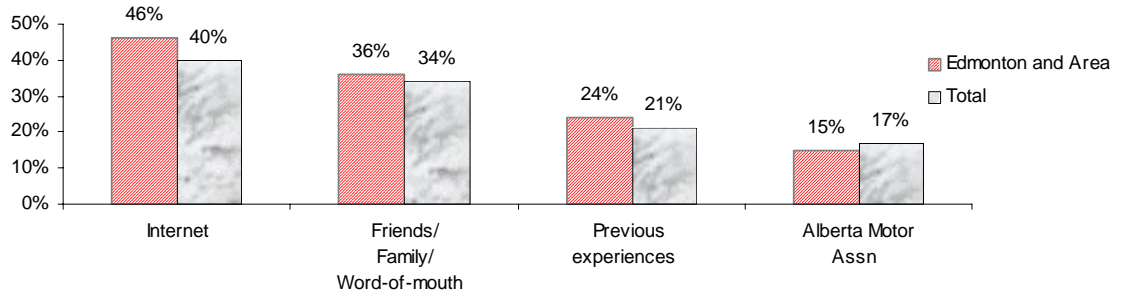
24

²⁴ Source: S3: Age; S2: Gender; D3: Household Income
 Base: All respondents travelling to Edmonton and Area (UNW = 492 [age, gender], 428 [income])

Traveller Profile_(continued)

- Only 4 sources of information were cited by at least 10% of Edmonton and Area visitors, which include: Internet in general, Word-of-mouth, Previous experiences, and the AMA.

Comparison of Visitor Information Sources to Aggregate



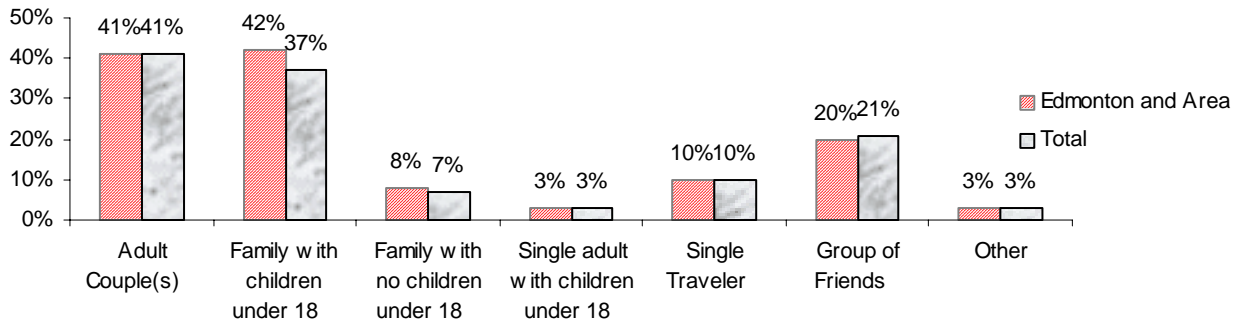
25

²⁵ Source: Q7: Information Sources
 Base: All respondents travelling to Edmonton and Area (UNW = 492)

Traveller Profile_(continued)

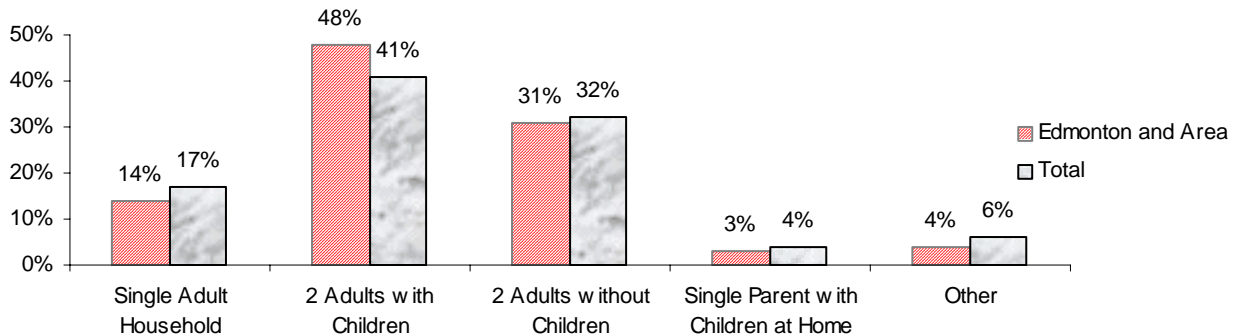
- Over 40% of Alberta travellers visiting Edmonton and Area plan to travel as adult couples during the next 6 months, and over 40% as families with children under 18. One fifth of visitors report travelling with groups of friends.
- There is a higher than average concentration of two adult households with children visiting Edmonton and Area.

Comparison of Trip Participants to Aggregate



26

Comparison of Visitor Family Composition to Aggregate



26

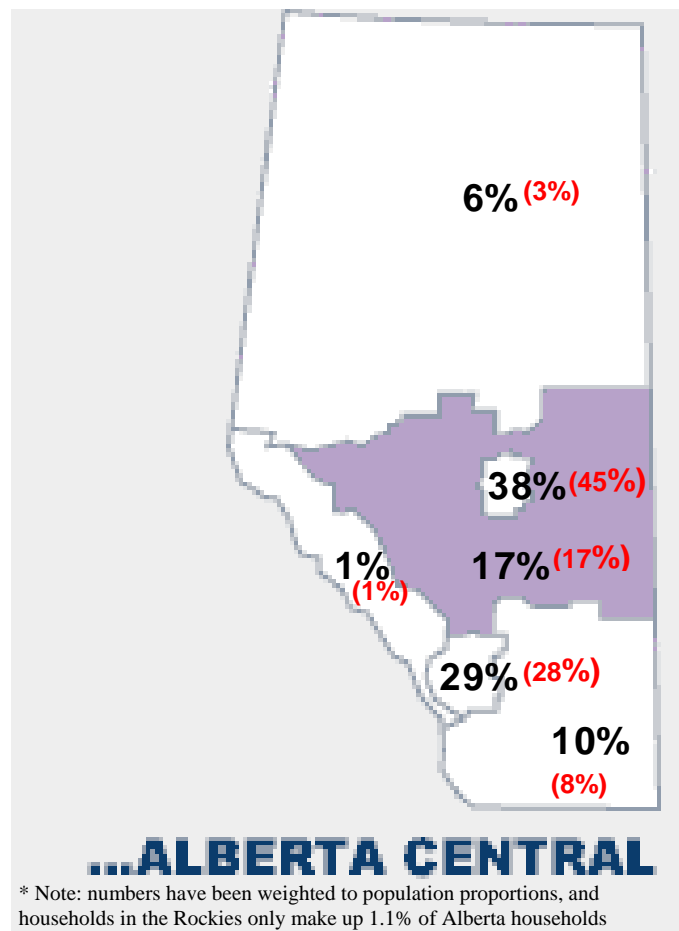
²⁶ Source: Q10: Composition of Participants; D1: Household Status
Base: All respondents travelling to Edmonton and Area (UNW = 490)

Alberta Central

Visitor Origin

- Travellers from Edmonton and Calgary (and Areas) will make up 2/3 of Albertan leisure travellers to Alberta Central over the next 6 months.
- With 31% of Alberta travellers planning to travel to Central Alberta, this region will receive the second highest proportion of Albertan travellers, visiting at least once, of all of the Tourism Destination Regions.
- On the map below, bold numbers indicate the proportion of visitors from each TDR to Alberta North from May – October, 2004. Numbers in brackets indicate the proportion of visitors from each TDR to Alberta Central from June – November, 2003. Note that the Alberta Central residents are travelling to destinations 80km or greater from their place of residence within the region.

Total Visitors to Alberta Central by Place of Residence (i.e., 38% of Visitors to Alberta Central are from Edmonton and Area)



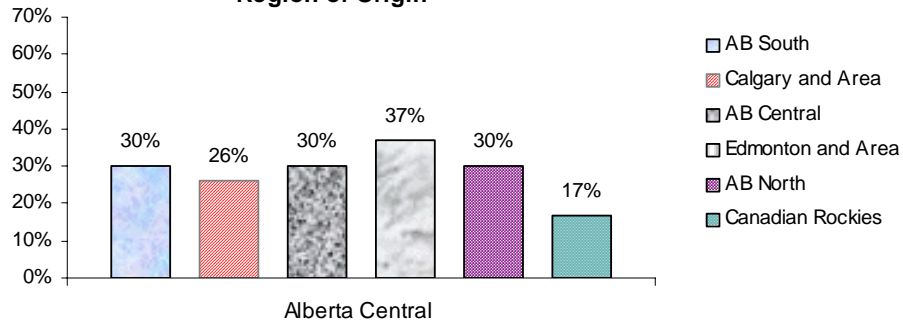
27

²⁷ Source: TDR: Place of Residence; Q6: Destination in Alberta; Base: All respondents travelling to Alberta Central (UNW = 405)

Destination Profiling

- Almost 1/3 of Alberta Central households plan to take at least 1 trip in Alberta Central over the next 6 months.

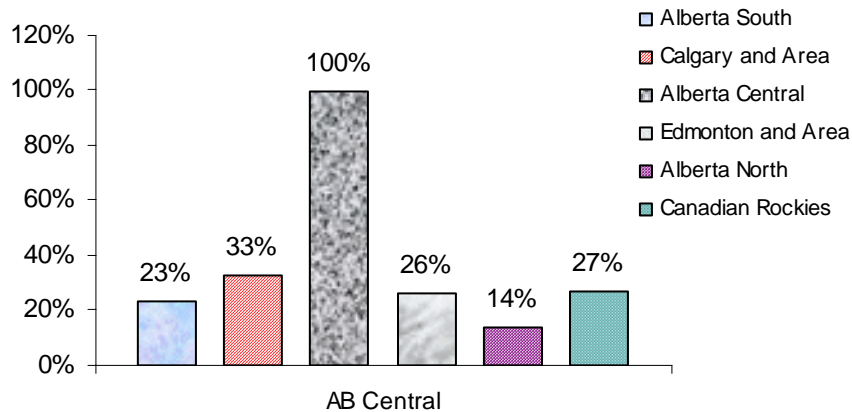
Percentage Travelling to AB Central by Region of Origin



28

- The lowest proportion of travellers to Alberta Central are also going to Alberta North in the next 6 months.

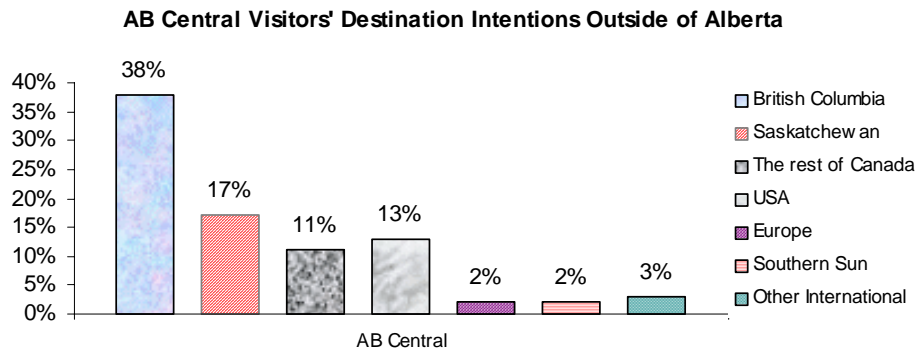
Other TDR's That Visitors to AB Central Intend to Visit



28a

²⁸ Source: Q6: Destination Plans
 Base: Albertan Travellers (UNW South=203, Calgary=350, Central=200, Edmonton=350, North=198, Rockies=101)
 28a Source: Q6: Destination Plans
 Base: All respondents travelling to AB Central (UNW = 405)

Destination Profiling_(continued)



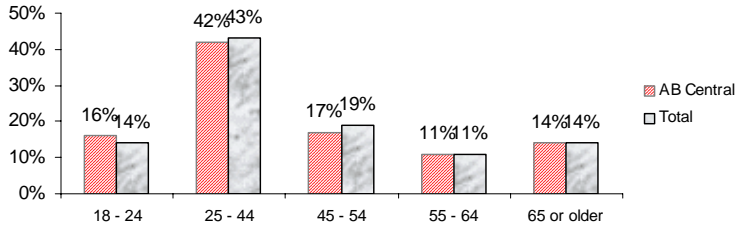
29

²⁹ Q3c: Destination Plans Outside of Alberta
Base: All respondents travelling to AB Central (UNW = 405)

Traveller Profile

- The mean age of Alberta travellers coming to Alberta Central is 44.

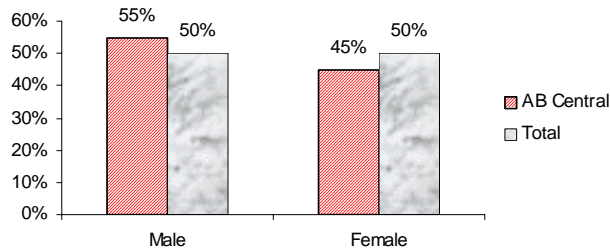
Comparison of Visitor Age to Aggregate



30

- A slightly higher percentage of visitors are male (55%).

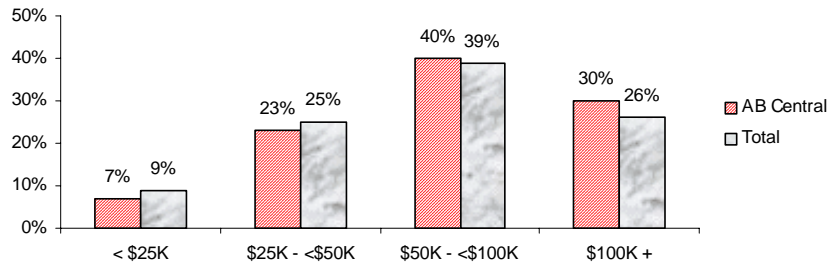
Comparison of Visitor Gender to Aggregate



30

- Mean household income for travellers visiting Alberta Central is the second highest of all the travel destination regions, at \$70,300.

Comparison of Visitor Income to Aggregate



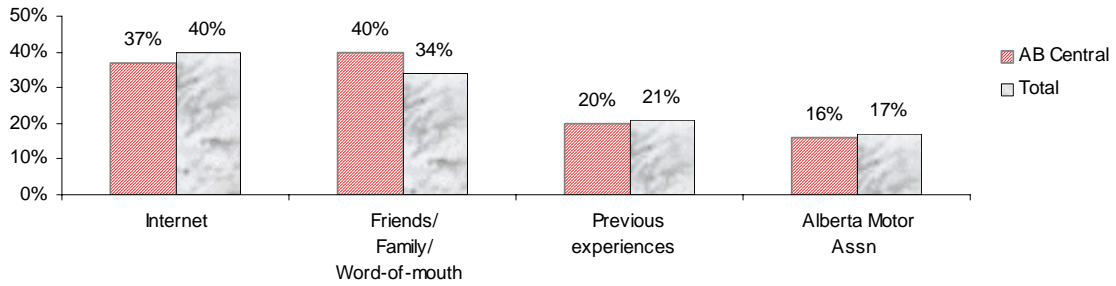
30

³⁰ Source: S3: Age; S2: Gender; D3: Household Income
 Base: All respondents travelling to AB Central (UNW = 405 [age, gender], 351 [income])

Traveller Profile (continued)

- Alberta central visitors use Word-of-mouth most often as a source of information when planning their trip. Sources cited by at least 10% of visitors are: Internet in general, Word-of-mouth, Previous experiences, and the AMA.

Comparison of Visitor Information Sources to Aggregate



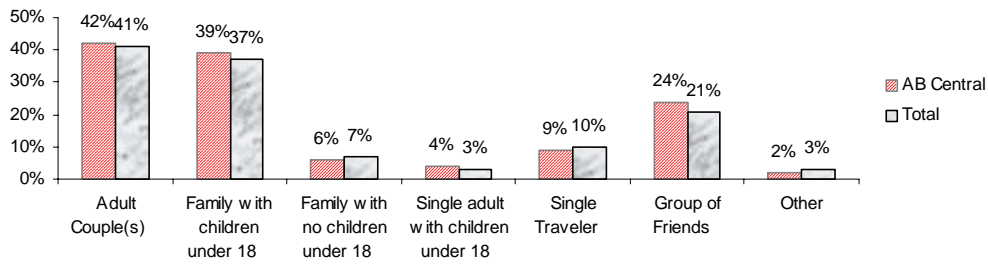
31

³¹ Source: Q7: Information Sources
Base: All respondents travelling to AB Central (UNW = 405)

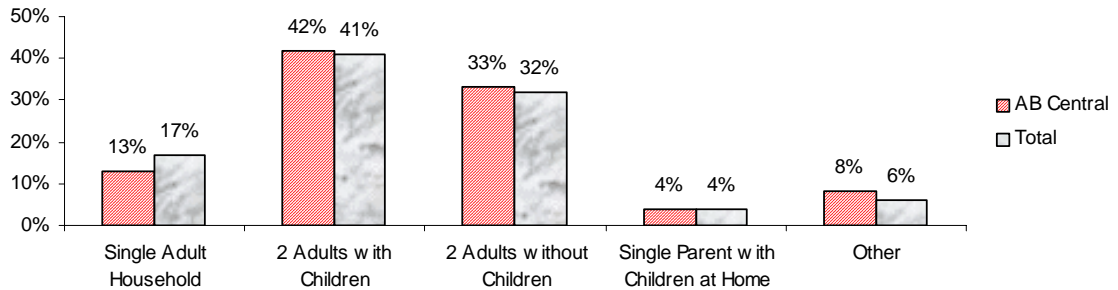
Traveller Profile (continued)

- Over 40% of Alberta travellers visiting Alberta Central plan to travel as adult couples during the next 6 months, and 39% as families with children under 18. 1/4 of visitors plan to travel with groups of friends.

Comparison of Trip Participants to Aggregate



Comparison of Visitor Family Composition to Aggregate



32

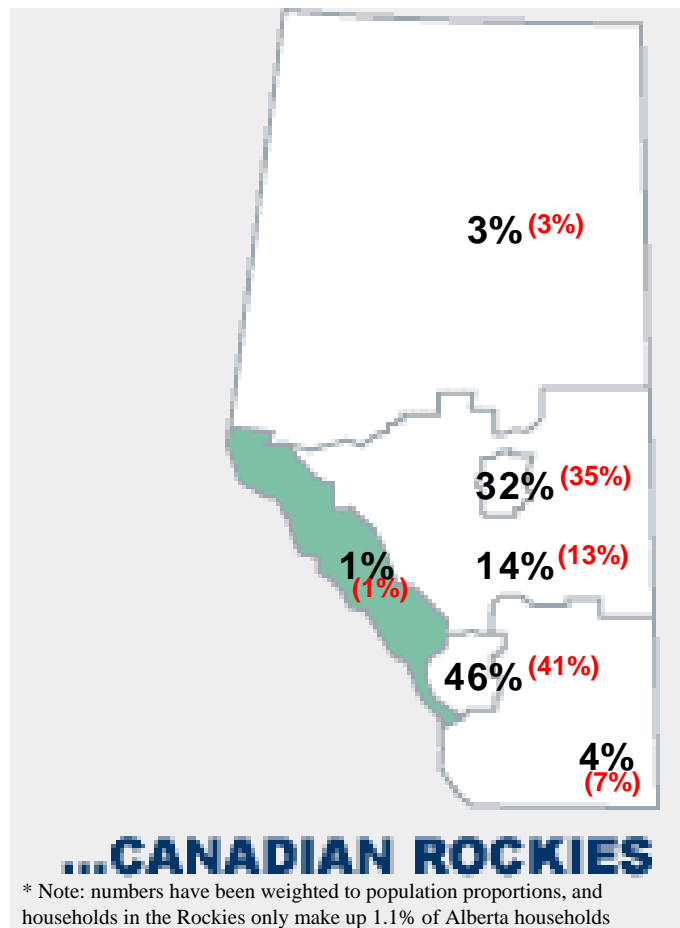
³² Source: Q10: Composition of Participants, D1: Household Status
Base: All respondents travelling to AB Central (UNW = 404)

Canadian Rockies

Visitor Origin

- Travellers from Calgary and Area will make up 46% of all Albertan leisure travellers to the Canadian Rockies over the next 6 months.
- With 35% of Albertan travellers planning to travel to the Canadian Rockies, this region will receive the largest proportion of Albertan travellers of all of the Tourism Destination Regions.
- On the map below, bold numbers indicate the proportion of visitors from each TDR to Alberta North from May – October, 2004. Numbers in brackets indicate the proportion of visitors from each TDR to the Canadian Rockies from June – November, 2003. Note that the Canadian Rockies residents are travelling to destinations 80km or greater from their place of residence within the region.

Total Visitors to Canadian Rockies by Place of Residence (i.e., 32% of Visitors to Canadian Rockies are from Edmonton and Area)



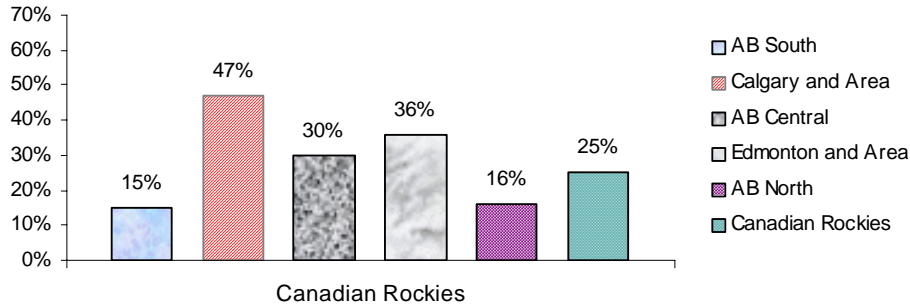
33

³³ Source: TDR: Place of Residence; Q6: Destination in Alberta
Base: All respondents travelling to Canadian Rockies (UNW = 446)

Destination Profiling

- Half of the households in Calgary and Area plan to take at least 1 trip in the Canadian Rockies over the next 6 months.
- Over 80% of Alberta travellers visiting the Canadian Rockies from May 1 to October 31 will be from Calgary and Area, and Edmonton and Area.

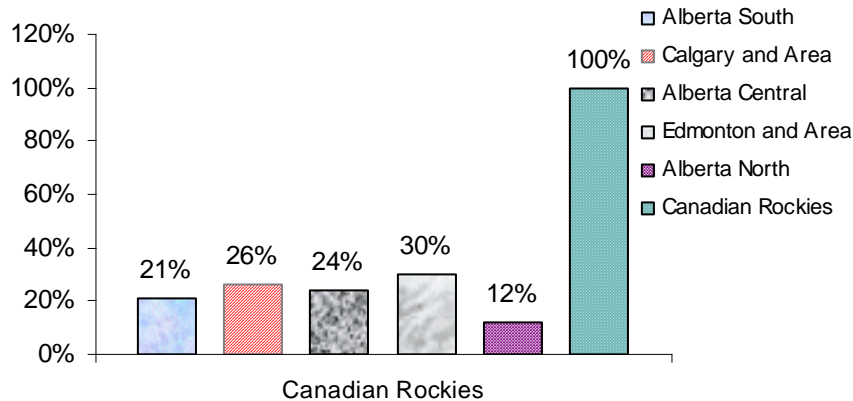
Percentage Travelling to the Canadian Rockies by Region of Origin



34

- The largest proportion of travellers to the Canadian Rockies are also going to Edmonton and Area. A higher proportion of travellers to the Canadian Rockies are planning trips to the rest of Canada.

Other TDR's That Visitors to Canadian Rockies Intend to Visit



34a

³⁴ Source: Q6: Destination Plans

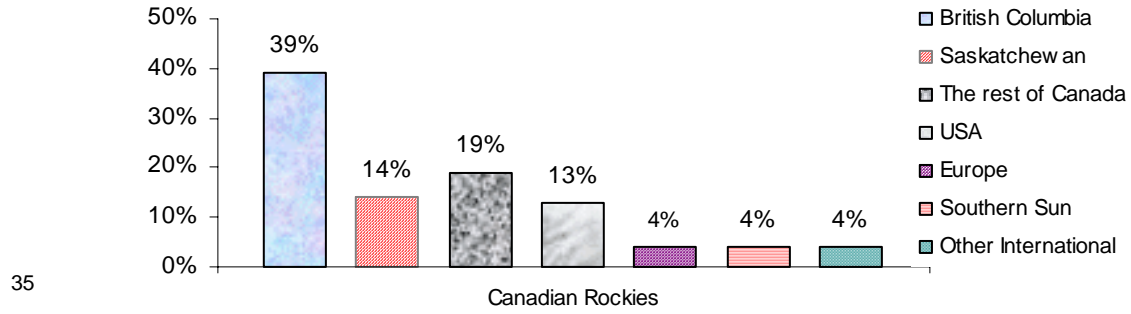
Base: Albertan Travellers (UNW South=203, Calgary=350, Central=200, Edmonton=350, North=198, Rockies=101)

34a Source: Q6: Destination Plans

Base: All respondents travelling to Canadian Rockies (UNW = 446)

Destination Profiling (continued)

Canadian Rockies Visitors' Destination Intentions Outside of Alberta



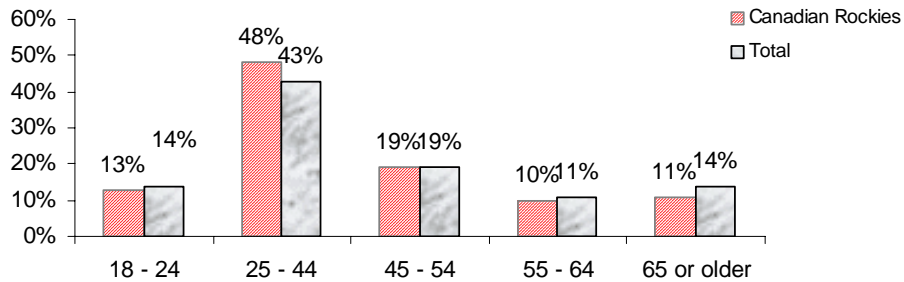
35

³⁵ Source: Q3c: Destination Plans Outside of Alberta
Base: All respondents travelling to Canadian Rockies (UNW = 446)

Traveller Profile

- The mean age of Alberta travellers coming to the Canadian Rockies is 42, with a higher than average concentration in the 25 – 44 age group, and a slightly lower than average concentration in the 65 or older age bracket.

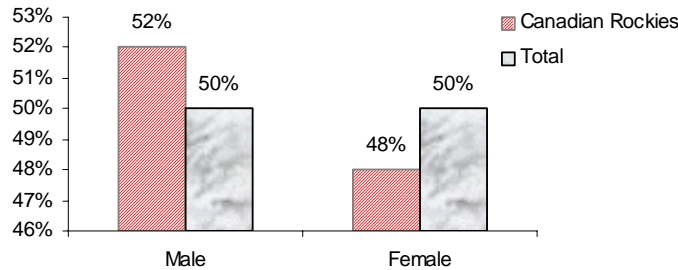
Comparison of Visitor Age to Aggregate



36

- A slight majority of planned visits are by males (52%).

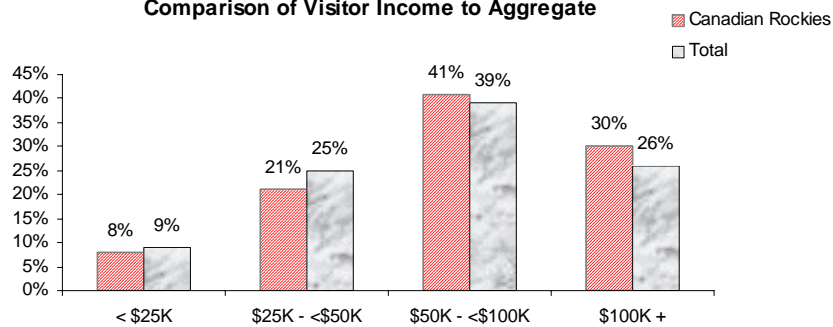
Comparison of Visitor Gender to Aggregate



36

- Mean household income for travellers visiting the Canadian Rockies is the highest of all the Tourism Destination Regions at \$70,700.

Comparison of Visitor Income to Aggregate



36

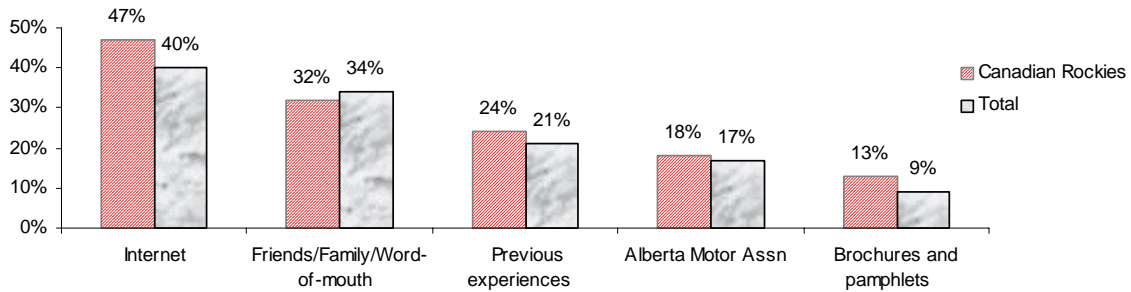
³⁶ Source: S3: Age; S2: Gender; D3: Household Income
 Base: All respondents travelling to Canadian Rockies (UNW = 446 [age, gender], 397 [income])

Traveller Profile (continued)

- Information sources cited by at least 10% of Albertan visitors include: Internet in general, Word-of-mouth, Previous experiences, the AMA, and Brochures and pamphlets.
- The Canadian Rockies is one of only two travel destinations in which visitors use Brochure and pamphlets as a major source (greater than 10%) of travel information. There is the highest concentration of Internet use as an information source by visitors to the Canadian Rockies of all Tourism Destination Regions.

37

Comparison of Visitor Information Sources to Aggregate

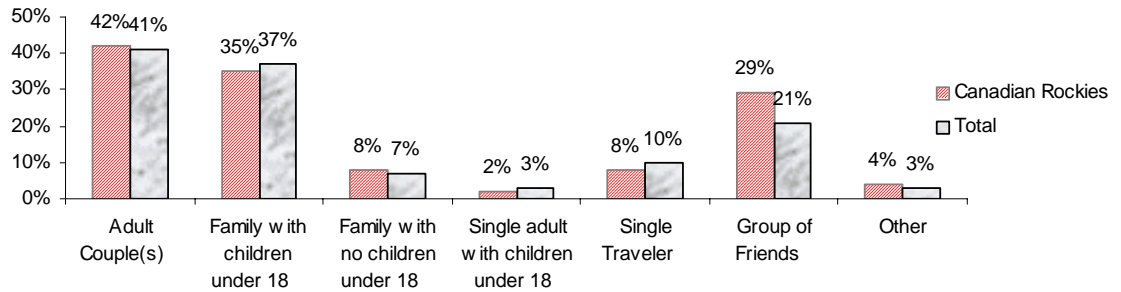


³⁷ Source: Q7: Information Sources
 Base: All respondents travelling to Canadian Rockies (UNW = 446)

Traveller Profile (continued)

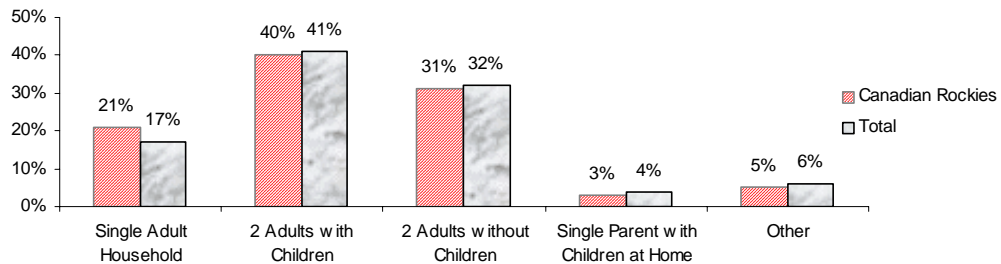
- 42% of Alberta travellers visiting the Canadian Rockies plan to travel as adult couples during the next 6 months, and 35% as families with children under 18.
- The Canadian Rockies has a higher than average concentration of groups of friends travelling together, and single travellers.

Comparison of Trip Participants to Aggregate



38

Comparison of Visitor Family Composition to Aggregate



38

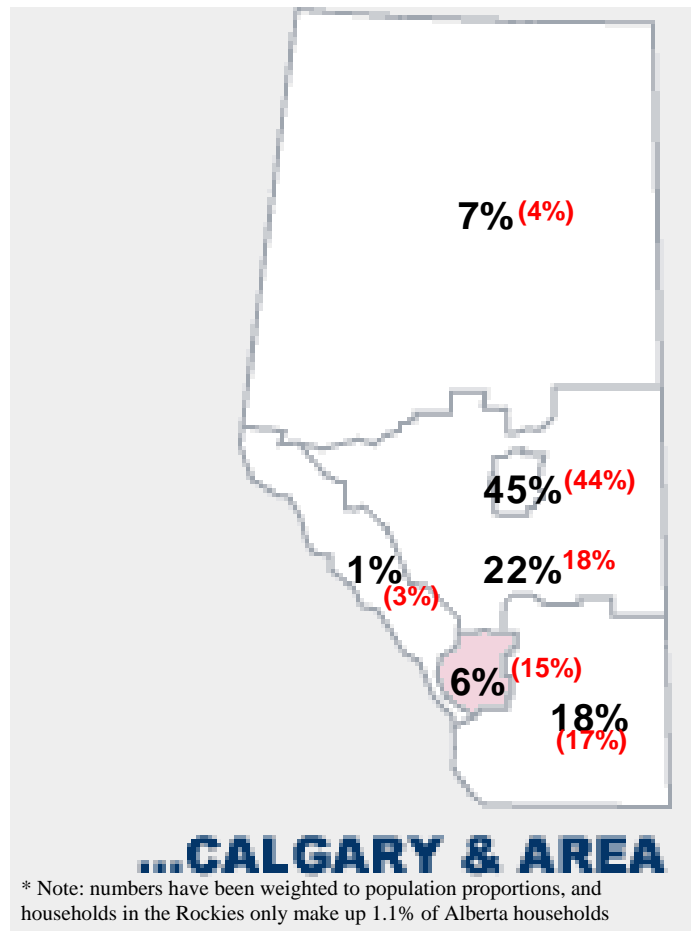
³⁸ Source: Q10: Composition of Participants; D1: Household Status
Base: All respondents travelling to Canadian Rockies (UNW = 446)

Calgary and Area

Visitor Origin

- Travellers from Edmonton and Area will make up 45% of all Albertan leisure travellers to Calgary and Area over the next 6 months.
- 29% of Albertan travellers plan to travel to the Calgary and Area region during the period May 1 – October 31.
- On the map below, bold numbers indicate the proportion of visitors from each TDR to Alberta North from May – October, 2004. Numbers in brackets indicate the proportion of visitors from each TDR to Calgary and Area from June – November, 2003. Note that the Calgary and Area residents are travelling to destinations 80km or greater from their place of residence within the region.

Total Visitors to Calgary & Area by Place of Residence (i.e., 45% of Visitors to Calgary & Area are from Edmonton and Area)

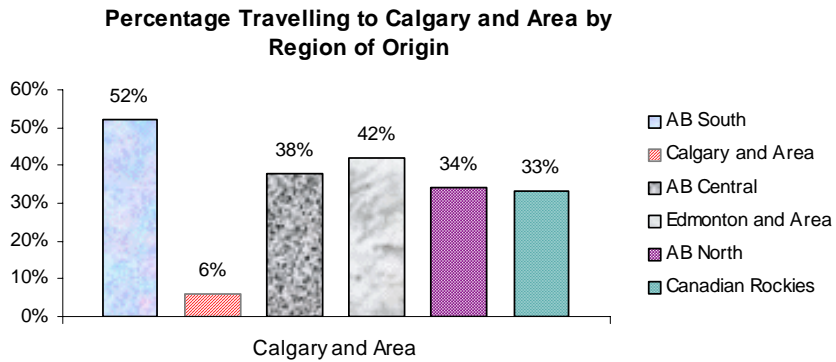


39

³⁹ Source: TDR: Place of Residence; Q6: Destination in Alberta
Base: All respondents travelling to Calgary and Area (UNW = 455)

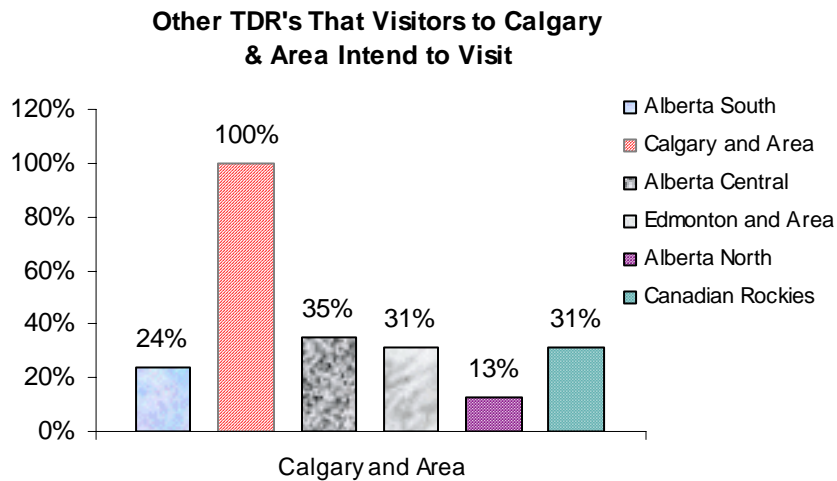
Destination Profiling

- More than half of Alberta South households plan to take at least 1 trip to Calgary and Area over the next 6 months.



40

- The largest proportion of travellers to Calgary and Area are also going to the Canadian Rockies, and the fewest are also going to Alberta North in the next 6 months.



40_a

⁴⁰ Source: Q6: Destination Plans

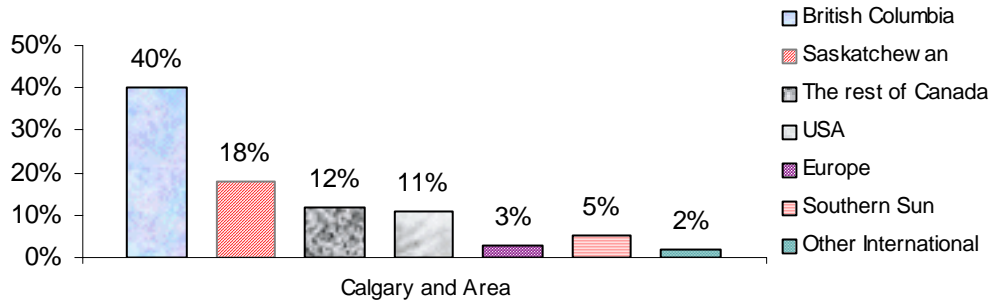
Base: Albertan Travellers (UNW South=203, Calgary=350, Central=200, Edmonton=350, North=198, Rockies=101)

40a Source: Q6: Destination Plans

Base: All respondents travelling to Calgary and Area (UNW = 455)

Destination Profiling (continued)

Calgary and Area Visitors' Destination Intentions Outside of Alberta



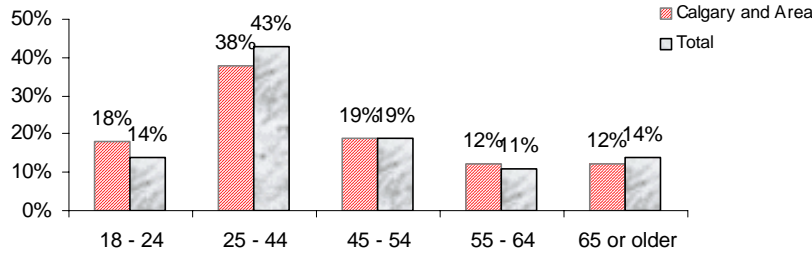
41

⁴¹ Q3c: Destination Plans Outside of Alberta
Base: All respondents travelling to Calgary and Area (UNW = 455)

Traveller Profile

- The mean age of Alberta travellers coming to Calgary and Area is 43, with a higher than average concentration in the 18 – 24 age bracket, and a lower than average concentration in the 25 – 44 age bracket.

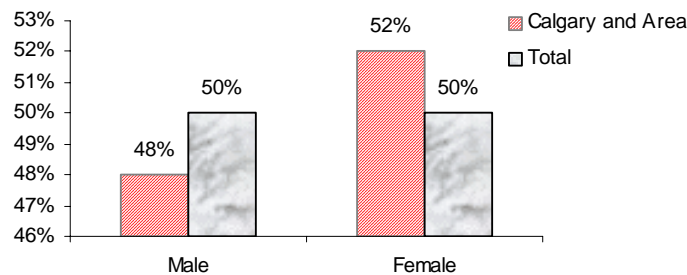
Comparison of Visitor Age to Aggregate



42

- A slightly higher percentage of visitors are female (52%).

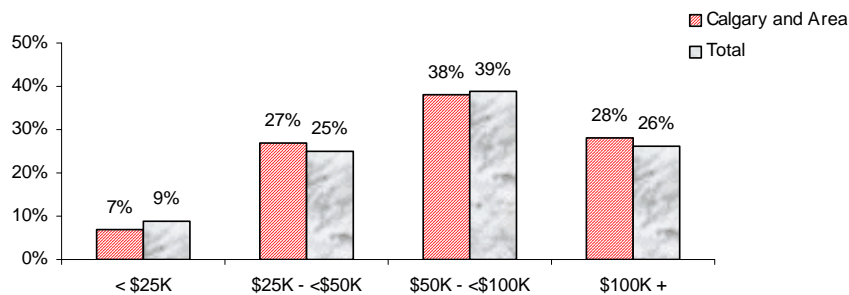
Comparison of Visitor Gender to Aggregate



42

- Mean household income for travellers visiting Calgary and Area is \$68,400.

Comparison of Visitor Income to Aggregate



42

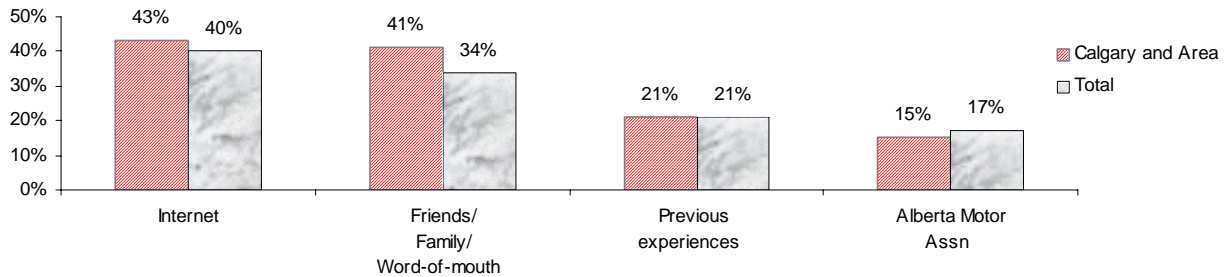
⁴² Source: S3: Age; S2: Gender; D3: Household Income
 Base: All respondents travelling to Calgary and Area (UNW = 455 [age, gender], 386 [income])

Traveller Profile (continued)

- The sources of information cited by at least 10% of visitors are: Internet in general, Word-of-mouth, Previous experiences, and the AMA.
- Travellers to Calgary and Area have the highest usage of Friends/Family/Word-of-mouth (41%) of all the Tourism Destination Regions.

43

Comparison of Visitor Information Sources to Aggregate

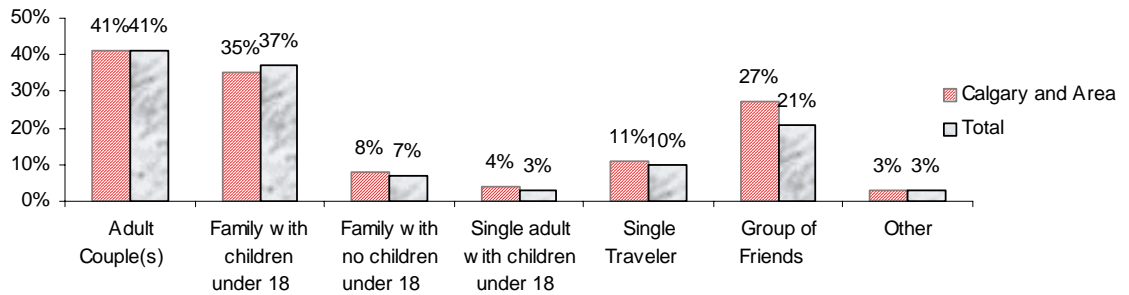


⁴³ Source: Q7: Information Sources
 Base: All respondents travelling to Calgary and Area (UNW = 455)

Traveller Profile (continued)

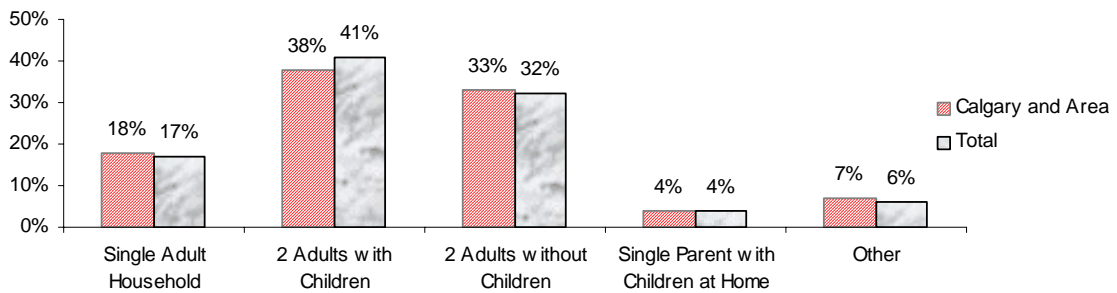
- Over 70% of Alberta travellers visiting Calgary and Area typically travel as adult couples or families with children under 18. Just over a quarter of visitors travel as groups of friends travelling together.

Comparison of Trip Participants to Aggregate



44

Comparison of Visitor Family Composition to Aggregate



44

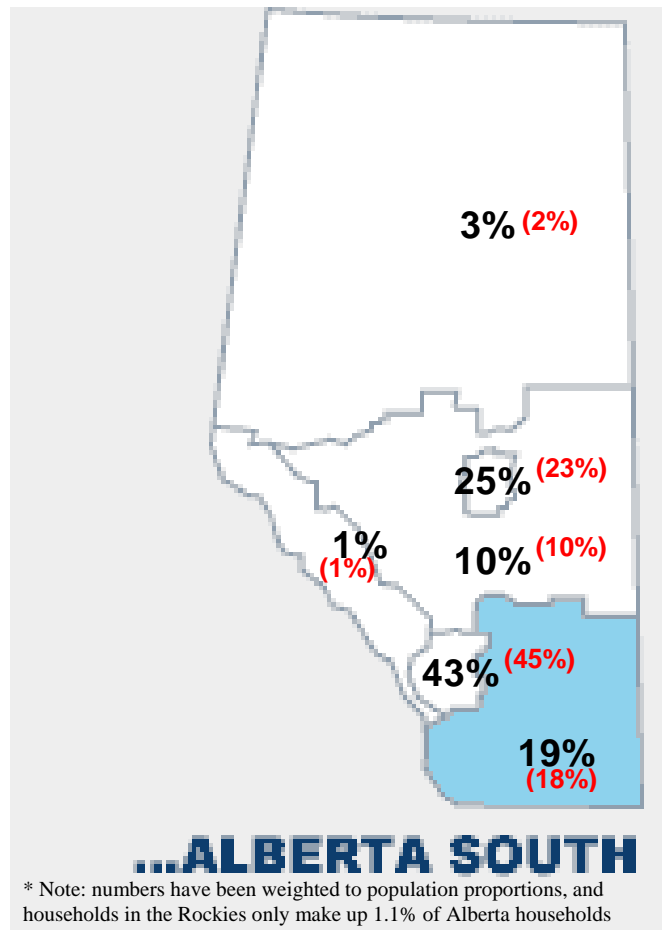
⁴⁴ Source: Q10: Composition of Participants; D1: Household Status
Base: All respondents travelling to Calgary and Area (UNW = 453)

Alberta South

Visitor Origin

- Travellers from Calgary and Area will make up 43% of all Albertan leisure travellers to Alberta South over the next 6 months.
- With only 23% of Albertan travellers planning to travel to Alberta South, this region will receive the second lowest proportion of Alberta visitors of all of the Tourism Destination Regions.
- On the map below, bold numbers indicate the proportion of visitors from each TDR to Alberta South from May – October, 2004. Numbers in brackets indicate the proportion of visitors from each TDR to Alberta North from June – November, 2003. Note that the Alberta South residents are travelling to destinations 80km or greater from their place of residence within the region.

Total Visitors to Alberta South by Place of Residence (i.e., 43% of Visitors to Alberta South are from Calgary and Area)

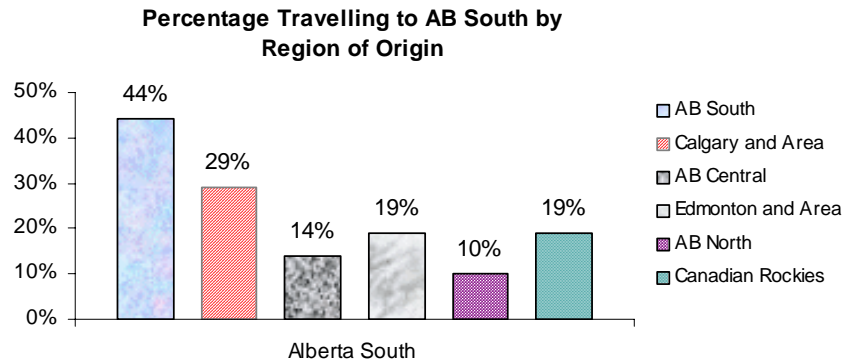


45

⁴⁵ Source: TDR: Place of Residence; Q6: Destination in Alberta
Base: All respondents travelling to Alberta South (UNW = 322)

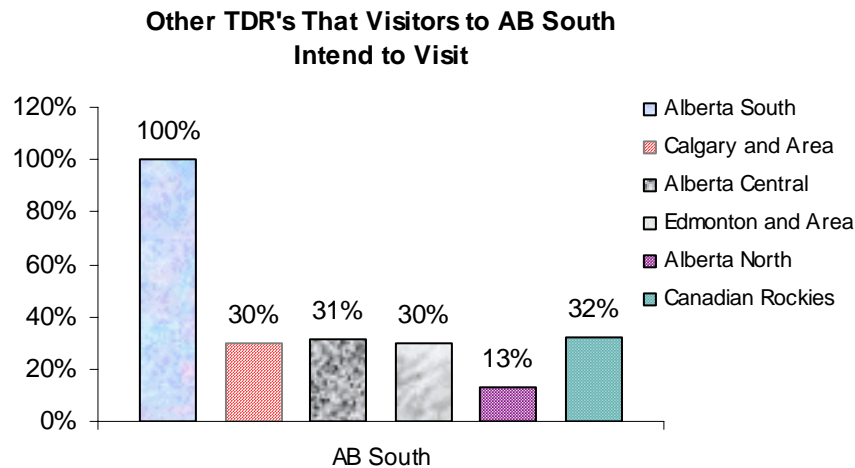
Destination Profiling

- Almost half of Alberta South households plan to take at least 1 trip in the region between May 1 and October 31.



46

- The smallest proportion of travellers to Alberta South are also going to Alberta North in the next 6 months.



46a

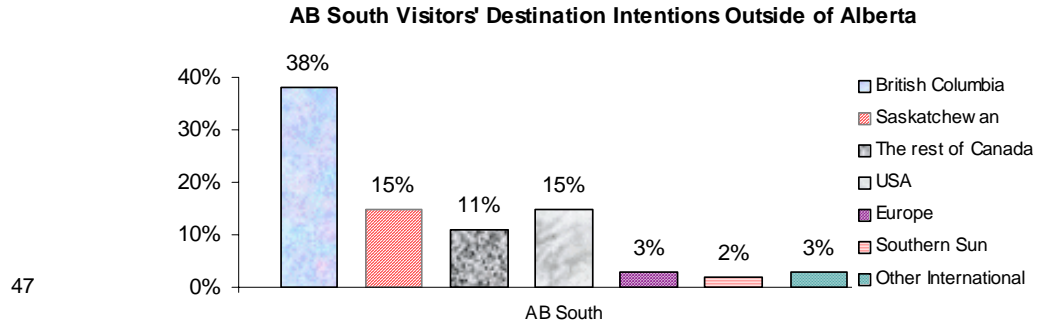
⁴⁶ Source: Q6: Destination Plans

Base: Albertan Travellers (UNW South=203, Calgary=350, Central=200, Edmonton=350, North=198, Rockies=101)

46a Source: Q6: Destination Plans

Base: All respondents travelling to AB South (UNW = 322)

Destination Profiling (continued)



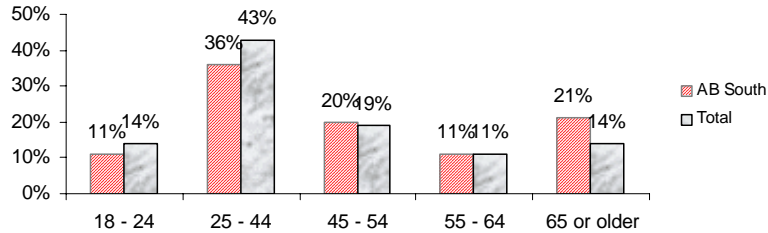
47

⁴⁷ Source: Q3c: Destination Plans Outside of Alberta
Base: All respondents travelling to AB South (UNW = 322)

Traveller Profile

- The mean age of Alberta travellers coming to Alberta South is 48, with a higher than average concentration in the 65 and older age bracket, and a lower than average concentration in the 25 – 44 age bracket.

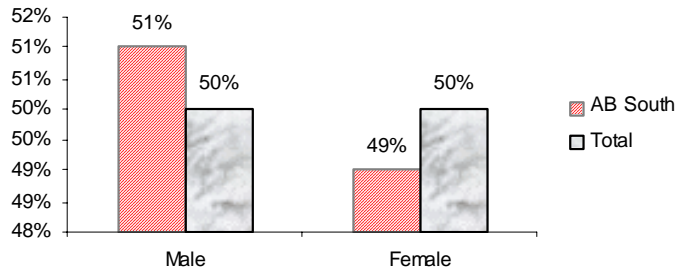
Comparison of Visitor Age to Aggregate



48

- There is an even split between males and females planning to visit the region.

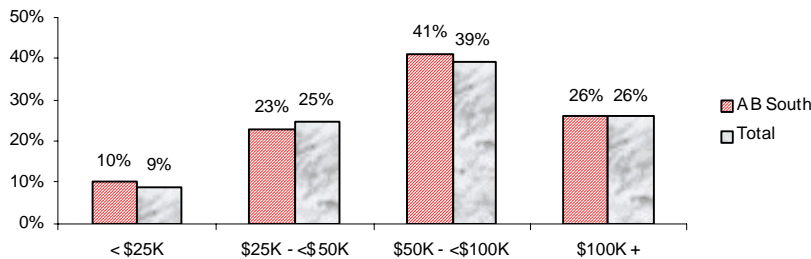
Comparison of Visitor Gender to Aggregate



48

- Mean household income for travellers visiting Alberta South is \$67,800.

Comparison of Visitor Income to Aggregate



48

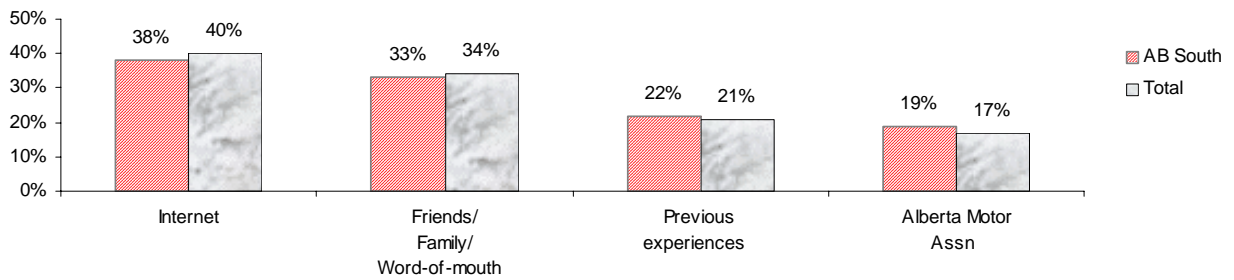
⁴⁸ Source: S3: Age; S2: Gender; D3: Household Income
 Base: All respondents travelling to AB South (UNW = 322 [age, gender], 282 [income])

Traveller Profile (continued)

- At least 10% of Alberta South visitors cited the following sources of information for travel plans: Internet in general, Word-of-mouth, Previous experiences, and the AMA.
- Travellers to Southern Alberta have the highest usage of AMA (19%) of all the Tourism Destination Regions.

49

Comparison of Visitor Information Sources to Aggregate

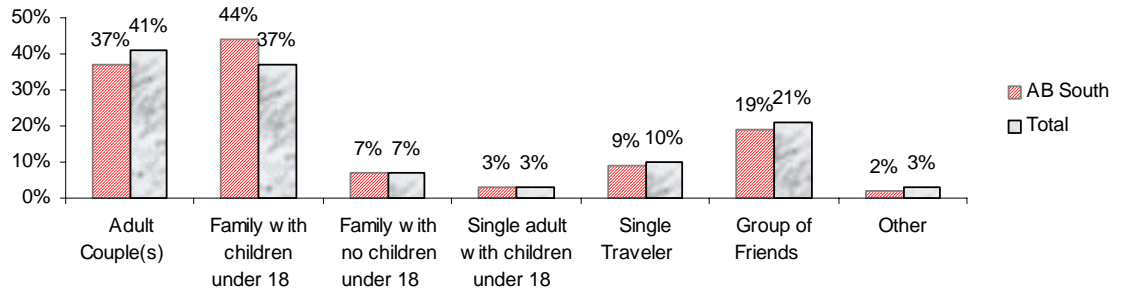


⁴⁹ Source: Q7: Information Sources
 Base: All respondents travelling to AB South (UNW = 322)

Traveller Profile (continued)

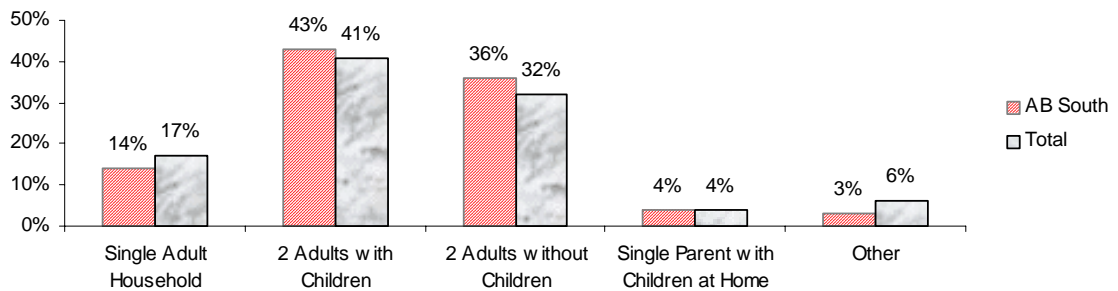
- Over 80% of Alberta travellers visiting Alberta South typically travel as adult couples or families with children under 18.
- There is a higher than average concentration of household that travel as families with children under 18 years of age visiting Alberta South.

Comparison of Trip Participants to Aggregate



50

Comparison of Visitor Family Composition to Aggregate



50

⁵⁰ Source: Q10: Composition of Participants; D1: Household Status
Base: All respondents travelling to AB South (UNW = 318)

Please contact us at:

16th Floor, Sun Life Place
10123 - 99 Street
Edmonton, Alberta, Canada T5J 3H1
Phone: (780) 944-9212
Fax: (780) 426-7622
E-mail: Jamie_Bliss@advanis.ca
www.advanis.ca